KALUM

TOURISM OPPORTUNITIES ANALYSIS

SUPPLEMENTAL STUDY

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EXECUTIVE SUMMARY

This report describes the results of the *Forest Tourism Opportunities Supplemental Study* undertaken in the Kalum Forest District. The study was conducted between November, 1999 and April, 2000. Funding was provided by the Ministry of Small Business, Tourism and Culture, the Northern Development Commission and Forest Renewal British Columbia. The project provides information which will contribute to forest tourism planning in the Kalum Forest District and will be useful in supporting appropriate, sustainable recreation and tourism development.

The Kalum Forest District covers an area of about 3.8 million hectares in Northwestern British Columbia. The Skeena River flows through the lower third of the district. The northern boundary reaches to the headwaters of the Nass River near the southern boundary of Spatsizi Plateau Wilderness Area. The area extends south to the Kitlope Park Heritage Conservancy Protected Area. The south-western corner also cuts through Hawkesbury Island in the Douglas Channel (Exhibit 1).

Table 1: Overall Visitor Activities in Northwest BC

Activities Undertaken in the Northwest Region	Visitors to Northwest BC		
	Non-Resident	BC Resident	
	Total %	Total %	North %
Art galleries/ museums/ exhibits	25	*	*
Sightseeing in the city/ town	16	—	—
Freshwater fishing	15	*	*
Sightseeing in the country	9	—	—
Visiting friends or relatives	8	93	94
Zoos/ natural displays/ gardens	8	*	*
Hiking/ backpacking	7	*	*
Nightlife	4	87	
Resting/ relaxing	5	—	—

Data on the activities of BC residents in the region was base n an 'aided' question and therefore is not as extensive as the non-resident resident data. (---denotes "not asked /no answer) (* denotes insufficient sample size to report findings).

Table 2: Visitor Spending Profile in Northwest BC

% Distribution of Total Expenditures	Overnight Visitors				
	Non-Resident			BC Resident	
	Non-Resident Total %	Regional Can & US %	Long Haul & Overseas %	Total %	North %
Food & beverage	19	27	14	30	27
Accommodations	14	19	11	18	15
Transportation	16	18	14	21	23
Souvenirs & gifts	6	7	5	7	7
Package tours purchased in BC	28	16	35	*	*
Outdoor activities	3	3	3	6	7
Attractions & cultural events	1	1	—	5	4
Other expenses	15	9	17	12	16

Non-resident expenditures represent all expenditures while in the province. BC resident expenditures represent only expenditures in the region. (— denotes less than 1%) (* denotes package expenses for BC resident visitors were considered pre-trip expenditures and were not included in the visitors' expenditures while travelling in BC).

Structure of Northwest Tourism Industry

Table 3: Kalum -- Summary of Tourism Operator Primary and Secondary Activities

Activity type	# of operators indicating this is their primary activity offering	# of operators indicating the activity is a secondary activity
Total Accommodation (non-gov't)	100	
Hotel/motel	27	
B&B	28	
Lodge	15	
Overnight Charter	16	
RV Campground	22	
Camping (non-facility)		12

Marina *	2 (public)	3 (private)
Museum	4	
Art Gallery / Sales	5	
Golf course	2 (public)	1 (private)
Ski Facility	1	
Ski Touring	2	3
Snowmobiling		2
Air tours/charters	14	18
Car Rental	5	
Taxi, Bus or Van tours	4	10
4x4 tours		3
Freshwater charter (fishing)	20	31
Jetboating		3
Salt water charters (fishing/tours)	37	41
Marine mammal		14
Motor cruising		27
Sailing		4
Scuba diving	6	13
Kayaking	5	11
Canoeing		10
Beach Activities/Swimming		12
Nature / Hiking	8	
Nature		29
Hiking		30
Fossil Hunting		6

Rock Climbing		4
Mountain biking		4
Horse and Trail	3	3
Hunting (MoE Guide-Outfitter)	3	
General Hunting		6
Wildlife viewing (land or water)		47
Bird watching		15
Scenic viewing		29
Heritage viewing		11

*Tourism operations only. Does not include Federal Government Wharves

Tourism Trends in the Northwest

While there is not any formal, on-going accounting for tourism statistics and/or trends either within the immediate study area or within the Northwest BC region, the following tourism trend indicators pertain specifically to the Kalum Forest District and Northwestern BC -- as provided by local tourism operators and professional experience[1]:

- The apparent "fishing crises" generated by the Department of Fisheries and Oceans has had immediate, dramatic and lasting negative impacts on both resident and non-resident anglers. Visitor fishing numbers are substantially down for the 1998 & 1999 fishing season over previous seasons due to the uncertainty in the marketplace regarding the catching and keeping of fish[2]. There is misinformation in the marketplace which is continuing to confuse potential visitors -- hence a drastic drop in the sport and recreational fishing subsectors;
- group travel throughout the Northwest region of BC is substantially down while the FIT market (independent traveller's utilizing a personal vehicle) appears to be growing. This supports global tourism trend analysis which states that people are more and more seeking travel experiences which allow them to explore when and where they wish;
- interest in, and participation in exploring and viewing the Nisga'a Memorial Lava Bed Park and volcano is growing;

[1] Research undertaken by the proponent while undertaking the study entitled: Economic Development Opportunities/Barriers: Forest-related Resources in the Kalum LRMP Study Area, Crane Management Consultants, Meredith & Associates and Majestic Forest Management, 1998.

[2] as reported by tourism sector operators

- the uncertainty regarding land-use policies is limiting growth in the private tourism sector (i.e.: the ongoing revising of the Commercial Backcountry Recreation policy, the uncertainty of local First Nations land claims process & the uncertainty of resource use management regimes in the Kitlope and Nass Valleys);
- visitation to local Tourism InfoCentres appears to be stable[3];
- many tourism operators are expanding the types of travel experiences they are offering. For example, many fishing guides and charter operators are diversifying their products to include soft adventure opportunities; and
- the continuation of a recession climate in BC will have direct and dramatic effects on the local & regional tourism industry[4].

Strengths and Weaknesses

Table 4: Regional Tourism SWOT Analysis

Tourism Strengths for the Kalum Forest District	
raw tourism product inventory which matches present & future tourist demands relatively easy access to the immediate area via: vehicle, air, ferry & motorcoach unique native cultural & heritage products present US $ exchange rate	small — yet in-place receptive tour operator infrastructure capable of servicing tourist needs world-class fishing product (both salt & fresh water) growing awareness of Northwestern BC as a desired tourism destination
Tourism Weaknesses for the Kalum Forest District	
overall lack of built and/or developed tourism facilities very limited number of tourism suppliers undercapitalized and under developed mix of tourism products the location of Terrace acts to discourage overnight visitation lack of "circle tour" product due to poor road condition (Canyon City to Cranberry Crossing/Highway #37)	lack of 'critical mass' of tourism operators with which to collectively market local tourism opportunities little or no support/leadership/direction from Provincial Government for tourism sector lack of awareness in marketplace of local/regional tourism opportunities

[3] this observation must be qualified as funding formulas tied to visitation numbers has led many InfoCentres throughout BC to "pad" visitation numbers in order to retain historical funding levels

[4] about 45% of all provincial tourism revenues are generated by residents of BC. With many residents suffering from the recession, spending on BC holidays and recreational equipment will continue to decline.

Tourism Threats for the Kalum Forest District	
uncertainty of land claims	continued negative image in the marketplace regarding fishing policies
uncertainty of both Provincial and/or Federal fisheries policies	conflicting land-use regimes
continuation of BC recession	poor investment climate
reintroduction of commercial fishing in the mouth of the Skeena	continuation of Coho closure (lack of opportunity to 'take home' fish)
Tourism Opportunities for the Kalum Forest District	
the development of unique ecotourism products to meet market demands	the development of proactive, ½ day local tour options to attract drive-by and group travel markets
promotion of affordable tour opportunities to immediate close-in region	development of 1st class RV park in Terrace to attract overnight RV market
pending road improvements — development and promotion of Nass Valley circle tour	

Tourism Development Opportunities

The table below summarizes the study's findings in terms of identifying areas of strong resource capability and favourable preliminary market evaluation.

Exhibit 1: Activity / Product — Community Match Matrix

1 ACKNOWLEDGEMENTS

In undertaking any form of tourism research and/or planning initiative, the need for effective local input and advice can not be over-emphasized.

Early in the work plan an *Industry-Government Partnership Team (IGPT)* was identified by the contractor and invited to attend a project start-up meeting in Terrace, BC (November, 1999). Thank you to the following IGPT members for helping to ensure that this project got off to an effective and efficient start:

Table1: Kalum Forest Tourism Opportunities Supplemental Study — IGPT Members

Alfie McDames Economic Development Officer Kitselas Band	**Jerry Morrison** Representative District of Stewart	**Myrtle Muldoe** Gitxsan Consultation Officer Gitxsan Treaty Office
Mike Morris Member Prince Rupert Backcountry Society	**Joe Whitney & Lisa Dunn** 16/37 Community Futures Development Corporation	**Paul Corcoran** Owner/Operator Black Fish Sea Kayaking
Chris Turner Kalum LRMP Representative Allied Tsimshian Tribes	**John Trewhitt** Area Manager BC Parks	**Paul Spring** Owner/Operator — Backcountry Wildlife & Hiking Tours
Tiffany Moore Ec. Development Coordinator Nisga'a Tribal Council	**Judy Miller-Bennett** Manager Kitimat Chamber of Commerce	**Ray Hepting** Owner/Operator Spring King Charters
Diane Collins, Chief Counsellor **Ron Bartlett**, Counsellor Kitsumkalum Band Council	**Ken Newman** Planning Technician Kalum Forest District	**Steve Brushey** Mount Remo Backcountry Society
Diane Hewlett Economic Development Officer City of Kitimat	**Ken Veldman** Executive Director — Terrace Economic Development Authority	**Terry Pratt** Land Officer BC Assets & Land Corporation

Wendy Shymanski Owner/Operator - Wildlight Tours Chairperson — Terrace Tourism	**Markus Marks** Owner/Operator Eagle Lodge and B&B	**Tony Jones** Local Representative Seven Sisters Ventures
Greg McDonald Instructor — NWCC Tourism & Recreation and Work Skills Programs	**Andrew Webber** Manager of Planning & Development Kitimat/Stikine Regional District	**Harold Demetzer** Senior Policy Advisor Northern Development Commission
	Zeno Krekic Director of Community & Economic Development — Kitamaat Village	

Appreciation is also extended to the following individuals who acted as *Support Team Members* throughout the project work plan and assisted in many facets of this project. Special thanks are extended for their particular role in ensuring that the Community Tourism Development Workshops were well advertised and in turn, well attended.

Sarina Germuth-Whitehead Private Contractor Kitimat / Kitamaat Village, BC	**Rana Nelson & Leanne Nahulak** Staff Members Terrace Tourism Council, Terrace, BC
Tiffany Moore Economic Development Coordinator Nisga'a Tribal Council, Gitwinksihlkw, BC	**Claudia Knight** Private Contractor Stewart, BC

Last but most definitely not least, many thanks go to all the resident tourism stakeholders (about 70) who took time out of their busy schedule to participate in this project by attending one or more Community Tourism Development Workshops which were held in early 2000 in Kitamaat Village, Gitwinksihlkw and Terrace. The ideas, suggestions and concerns expressed at these workshops greatly added to the overall quality of the project.

2 INTRODUCTION

Tourism is one of the world's largest employment and revenue generators. *Tourism Canada* expects tourism to out-perform all other economic sectors as we approach the next century. In the United States, forest based recreation and tourism is expected to generate 100 billion dollars in economic activity in the year 2000.

British Columbia has become increasingly reliant on tourism to generate revenue and create jobs. The province is world renowned for it's natural environment; "Super Natural British Columbia" is a marketing focus of Tourism British Columbia. The ability of the tourism industry to thrive and expand depends, in part, on the maintenance of the natural environment. Recreation, for many residents, is an important component of personal well-being. The decision to reside in one region over another is often influenced by the recreational opportunities to be found nearby. Thus the government is tasked with balancing the land and environmental requirements of the industrial sectors with those of tourism and recreation.

The Ministry of Forests (MoF) is responsible to administer and manage recreation on Crown forest lands. The Ministry of Small Business, Tourism and Culture (MSBTC) is responsible for ensuring tourism values and interests are fully considered and accommodated within provincial, regional and sub-regional land, water and resource use planning initiatives. Forest Recreation and Tourism Resource inventories are fundamental components to fulfilling these obligations.

This report describes the results of the *Forest Tourism Opportunities Supplemental Study* undertaken in the Kalum Forest District. The study was conducted between November, 1999 and April, 2000. Funding was provided by the Ministry of Small Business, Tourism and Culture, the Northern Development Commission and Forest Renewal British Columbia. The project provides information which will contribute to forest tourism planning in the Kalum Forest District and will be useful in supporting appropriate, sustainable recreation and tourism development.

In addition to project outcomes called for in the original terms of reference, this document also contains two (2) additional products:

- A detailed and extensive review, profile and analysis of fifteen (15) select tourism activities/products (Appendix A); and
- An updated, stand-alone document entitled: Developing a Tourism Business: A Handbook for Tourism Entrepreneurs (Document 2 of 2)[1].

These two additional products offer value-added project outcomes and have been developed and included in an effort to ensure that final project outcomes provide up-to-date tourism product intelligence as well as tourism development tools. These two document will be of substantial use to any regional residents and/or communities in proactively addressing tourism development opportunities.

2.1 How To Utilize This Document

This document has been organized in such a way as to allow easy access to those Sections that are of

[1] Not available as a web-enabled product at this time.

interest to the reader.

- **Chapter 1** — **acknowledges** the Industry-Government Partnership Team and Project Support Team members in assisting with this project;
- **Chapter 2** — **introduces the project** and provides some history behind the initiative to undertake a "supplementary" study to the completed Kalum Forest Recreation & Tourism Opportunity Study (FTOS) completed in February, 1999;
- **Chapter 3** — provides a review of **tourism statistics** for Northwestern BC;
- **Chapter 4** — provides a review of **tourism trends** which helps to set the stage and determine target markets for the final tourism development recommendations;
- **Chapter 5** — (5.0 to subsection 5.4) addresses the overall **profile** of the study area (Kalum Forest District). Subsection 5.5 looks at a few very pertinent **land use planning** factors, and subsections 5.6 & 5.7 provide an analysis of regional and community-cluster **tourism analysis**;
- **Chapter 6** — provides a review of "tourism" vies a vie "recreation" in the Kalum Forest District (KFD) as well as the existing **status** of tourism and recreation offerings in the study area;
- **Chapter 7** — reviews, in some detail, the **tourism activities** having the highest potential for the study area. This includes a SWOT analysis of the ten top tourism activities as well as a chart and map which links these opportunities to the study area; and
- **Chapter 8** — provides a series of tourism development **recommendations** which apply to all communities and stakeholders in the study area. Each recommendation is discussed in terms of: the rationale behind the recommendation; action steps required in order to act on the recommendations; suggested project responsibility and suggested project partners.

In addition to the main report, a number of supporting documents have been provided in the Annexes if this report (Document 1 of 2 — Annexes A to C):

- **Appendix A** — Provides an extensive and comprehensive **analysis** of fifteen (15) tourism product profiles. This document could be a stand-alone reference text for a tourism entrepreneur wishing to develop an activity based tourism product or service;
- **Appendix B** — Provides a series of ten (10) tourism development **capability maps** showing areas within the Kalum Forest District which hold higher than average potential to support each of the 10 highest potential activities; and
- **Appendix C** — Provides a sample community-based **visitor survey** designed as a starting point for the development of visitor surveys and visitor statistic in study area communities.

There are two (2) documents which form the final products for this project. The **second document**[2] (Document 2 of 2) is entitled: Developing a Tourism Business: A Handbook for Tourism Entrepreneurs. This stand-alone document is targeted at the first-time tourism business operator interested in developing a tourism product or service.

2.1.1 Regional verses Community Approach

Opportunities for activity/product development for the four major communities in the Kalum area

[2] Not available as a web-enabled product at this time.

are presented in Chapter 7. The recommendations made in the final chapter address broader tourism development considerations that are generally shared by all communities — recognizing that there are local issues that have to be taken into account as well. There are several reasons why the recommendations are structured from a regional perspective:

- Many of the important development considerations (e.g. highway infrastructure, training, packaging, communications) are regional in nature and attempts should be made by tourism development stakeholders to deal with them on a regional basis. Much as the Northwest Regional Transportation Task Force was launched on a regional level, so should tourism development;
- By cooperating at a regional level, the chances of duplication and competition for scarce program resources can be minimized. At the same time, access to program funding is very often enhanced with a regional approach because it demonstrates an ability to partnership and network; and
- The tourism economy in the Northwest does not stop and start with forest district geographic boundaries. Economic linkages in the tourism industry can be quite complex, connecting communities in unseen ways. Many tourism operators are based in one community yet operate in another. They may have operating areas and tenures that span several communities. One community may be an important transportation staging area for visitors in a region, while training resources may be centred in another. In attempting to bolster tourism activity in the Kalum, local economic development organizations should be looking for cooperative solutions and not unnecessarily restricting their actions.

Communities do have the option of proceeding with strategy implementation on their own, identifying and prioritizing actions for themselves. However, it is hoped that they also realize the many benefits of collective action and cooperate as much as possible on bringing down the many barriers that prevent tourism from generating more economic benefits to the region.

2.2 Project Purpose

The fundamental purpose of this project can be defined as:

To build capacity, create employment opportunities, and diversify the economy through the review and analysis of existing tourism resources inventories as well as specific tourism activities/products — directed at the preparation of tourism development recommendations.

2.2.1 Where Are We — Where Are We Going?

Over the past number of years, a myriad of government agencies have undertaken a variety of research and/or data collection targeted at the tourism and recreation sectors in Northwestern BC. While the most recent research project is the Kalum FTOS study, tourism operators have been subject to numerous surveys and focus groups. So many in fact, that stakeholders are frankly very tired of attending a variety of "planning" meetings and/or filling out surveys. In a nutshell --it is time to actually implement some proactive and positive initiatives which actually have a real world and positive effect on both existing tourism & recreation operators as well as potential tourism entrepreneurs.

The FTOSS provides an opportunity to move from planning to implementation. There exists an opportunity to provide stakeholders with quality tools and strategies to move forward in improving or developing successful tourism products.

To follow is a brief review of the tourism land use planning and inventory programs that provide the starting point to this FTOSS initiative. In addition, there are a number of other government initiatives that could very easily build on the work generated in this work program.

2.3 Tourism Resource Inventories and Tourism Capability Modelling

The Ministry of Small Business, Tourism and Culture (MSBTC) has the responsibility to ensure that tourism values and interests are available for, considered and accommodated in treaty negotiations and provincial, regional and sub-regional land, water and resource planning initiatives. The key to fulfilling these obligations are forest recreation and tourism resource inventories and analysis. Furthermore, the evaluation of potential forest recreation and tourism business opportunities requires technically sound resource inventories that support integrated resource and community planning targeted towards economic, social and environmental sustainability.

Since 1991 MSBTC has been actively conducting tourism resource inventories and tourism capability modelling throughout British Columbia. By 1998 the Tourism Resource Inventory (TRI) had been completed for the entire province at a strategic (1:250,000) scale. While suitable for provincial and regional planning purposes, MSBTC soon realized that the inventory and capability models did not provide adequate detail for sub-regional or community planning. Starting in 1996, MSBTC initiated 1:20,000 scale Tourism Opportunity Studies (TOS) and Forest Recreation and Tourism Opportunity Studies (FRTOS).

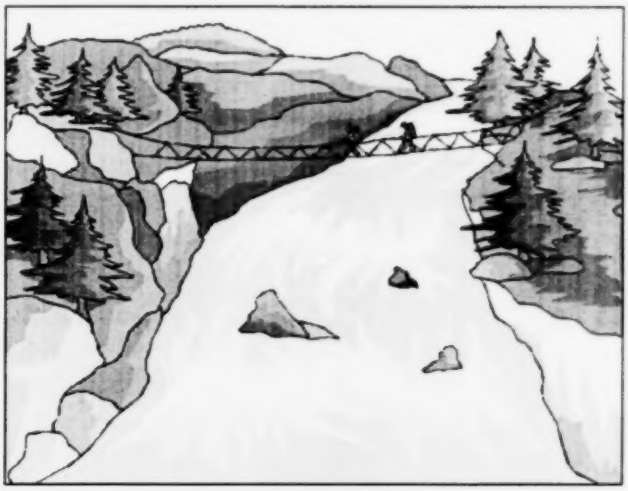
A FRTOS consists of a 1:20,000 digital inventory of tourism operators, facilities, features, and areas of use, along with predictive models that are used to evaluate the potential of the natural resource base to support tourism activities. While relying heavily on existing data sources such as the TRI and the Ministry of Forest's Forest Recreation Inventory (FRI), the FRTOS provides greater detail and incorporates local concerns, constraints and issues. A key component of the FRTOS is the identification of opportunities and constraints for tourism development, as well as defining current and possible future resource values to the tourism and recreation sectors.

The information compiled and generated through the FRTOS planning process can be used by provincial agencies to contribute to the implementation of the associated LRMP's. By improving on the TRI and FRI, MoF and MSBTC will be better positioned to support local agencies, First Nations and community groups as they seek to develop tourism and recreation opportunities which can be incorporated in local or community level economic development and diversification initiatives that minimize conflicts with other resource sectors while maintaining access to recreational resources for local residents. The results may also contribute towards treaty negotiations.

2.4 Forest Tourism Opportunities Supplemental Study (FTOSS)

Building upon the results of the FTOS which has been completed for the Kalum Forest District,the Forest Tourism Opportunities Supplemental Study (FTOSS) results in a more detailed analyses of tourism opportunities in the study area. The overriding goal of the FTOSS is to provide a clear investigation of tourism opportunities which -- in addition to having positive natural resource values in the study area -- have strong support from the local communities and residents, a proven

potential market, and are least likely to experience use conflicts due to land tenure and/or conflicting uses. In a nutshell, the FTOSS strives to provide both existing and potential tourism operators additional knowledge, research and tools with which to develop a stronger business plan based on both product development and target market realities.



3 TOURISM STATISTICS

3.1 Statistics — Visitors to Northwest BC

The development of, and access to, up-to-date and pertinent visitor research is fundamental to the successful design, development and operation of a tourism service or product. The importance of visitor research as been well stated by Tourism British Columbia[3]:

The future success of BC's tourism industry requires detailed market information on visitors (both resident and non-resident) who travel within the Province.

This information will enable the industry to better understand who these visitors are, the type of trips they take, their travel motivations and trip satisfaction, as well as trip planning processes. This in turn will help the industry to better market its products, and to meet the needs of the travelling public.[4]

Unfortunately, data sources do not exist which comprehensively account for visitors to Northwestern BC. Presently there are two main sources of visitor information, community-based Visitor InfoCentres and provincially-based visitor surveys which occur from time to time (the last BC visitor survey was completed for the 1995/96 visitor season).

While regional Visitor InfoCentres diligently record statistics of visitors availing themselves of their services — more often than not the statistics generated within the centres are very general in nature and only account for those visitors actually contacting the InfoCentre directly (walking in and/or contacting for information). They do not and can not provide a comprehensive picture of the myriad of visitors entering the region each tourism season. In addition, and in recognition that annual funding levels are based in part upon the total number of visitor/parties utilizing each InfoCentre — there is a general acceptance within the system to "pad" visitor statistics, thereby additionally skewing visitor statistics.

Over the past number of years, provincial visitor survey initiatives have less than effectively surveyed visitors to this area of the province. The main item of concern is the lack of visitor survey / contact points addressing the Highway #37 "North To Alaska" highway corridor. Survey contact points have been facilitated along the Highway #16 corridor (usually Prince George & Prince Rupert) but visitors entering or exiting the region via the Highway #37 corridor are mostly missed during these provincial visitor surveys. In recognition that a vast number of visitors to the study area utilize this corridor, regional data summations are weak in this respect.

Nevertheless, the 1995/96 Provincial Visitor Study remains the only real source of visitor statistics for the Kalum Forest District. To follow is a brief review of the results for Northwestern BC (NWBC) as generated in this study. It is wise to regard the following as "indicators" only and not definitive visitor statistics.

3.1.1 Visitor Volume and Value

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[3] British Columbia Visitor Study: Report on Travel in British Columbia — Destination Report: The Report on Visitors to Northern British Colombia Tourism Region: Northwest, Tourism BC, 1998.

[4] Ibid. No.: 2, page 3.

It has been estimated that about 2.2 million visitors travelled to NWBC for a day or overnight trip, 73% of whom are residents of BC. The total NWBC share of provincial visitation is about 7%.

Visitors to NWBC spend about $425 million per season with non-residents accounting for 33% of this spending and BC residents providing 67% of regional revenues. Both non-resident and resident visitors spend on average $54 per day during their stay. However, non-residents spend about $234 per stay in the region as compared to resident spending of about $178 per stay. The total NWBC share of provincial tourism revenues is about 5%.

Non-resident visitors spend an average of 4.4 days in the region and resident visitors stay in the region about 3.4 days per visit.

3.1.2 Visitor Origin

"Other" Canadians accounted for the greatest proportion (38%) of non-resident visitors to NWBC. Close-in regional US and Long Haul US visitors made up a further 23% and 17% respectively of travellers to the region. Overseas visitors accounted for about 13% of non-resident guests.

Resident visitors from northern BC accounted for the largest proportion (55%) of travellers to the region. Visitors from southern BC accounted for 34% of resident visitors to NWBC.

3.1.3 Trip Purpose

The main purpose of the visitors to NWBC who were on an overnight trip in BC and visited the region was for leisure purposes (81% non-residents and 86% residents).Other Canadians and US visitors were the most likely markets (21%) to have travelled for business purposes.

Nearly one-half of non-resident regional leisure travellers journeyed to BC to visit friends or relatives (44%). Long Haul/Overseas leisure travellers cited general sightseeing (39%) as their main reason for travel, followed closely by visiting friends and relatives (30%).Outdoor/wilderness activities were given as the main reason for travel by 20% of regional visitors (other Canada & close-in US) and 16% of Long-Haul/Overseas visitors.

Nearly one-half of resident leisure visitors (47%) travelled in BC to visit friends or relatives (VFR). About 17% cited outdoor activities as their main reason for travel.

3.1.4 Visitor Demographics

Non-residents averaged 44 years of age. Those from Long Haul/Overseas markets tended to be older with 38% aged 55 years and older. Nearly one-half of close-in 'other' Canadians and US visitors (47%) were between the ages of 35 and 54.

Resident visitors averaged 42 years of age and were more likely to be between 18 and 34 years of age than their non-resident counterparts (35% versus 30% respectively).

3.1.5 Visitation to the Kalum Study Area

Non-resident visitors travelled extensively throughout the Northwest region with the Kitimat/Stikine Regional District area[5] capturing about 29% of the total non-resident visitors. Only 13% of resident visitors stated that they visited the Kalum study area.

3.1.6 Seasonal Variations

As expected, the summer season is by far the busiest tourism season in NWBC with 73% of the non-resident Long Haul/Overseas market visiting during this season. Over half of close-in 'other' Canadians and US visitors (55%) travelled to BC during the summer.

Almost half of the resident market (49%) visited NWBC during the summer season. This market also makes up about 31% of all visitors to NWBC during the winter months.

3.1.7 Overall Visitor Activities

While in Northwestern BC, non-resident visitors showed substantial interest in a number of activities including visiting art galleries/museums/exhibits (25%), city/town sightseeing (16%) and freshwater fishing (15%). Only 8% of non-resident visitors reported visiting friends and relatives while in the region.

Virtually all resident visitors (93%) spent time visiting with friends and relatives during their visit to NWBC. Other activity details are shown in Table 2:

Table 2: Overall Visitor Activities in Northwest BC

Activities Undertaken in the Northwest Region	Visitors to Northwest BC		
	Non-Resident	BC Resident	
	Total %	Total %	North %
Art galleries/ museums/ exhibits	25	*	*
Sightseeing in the city/ town	16	—	—
Freshwater fishing	15	*	*
Sightseeing in the country	9	—	—
Visiting friends or relatives	8	93	94
Zoos/ natural displays/ gardens	8	*	*
Hiking/ backpacking	7	*	*

[5] Includes the communities of: Kitimat/Kitamaat Village, Terrace and area, the Nass Valley & Stewart, BC.

Nightlife	4	87	
Resting/relaxing	5	—	—

Data on the activities of BC residents in the region was based n an 'aided' question and therefore is not as extensive as the non-resident resident data. (— denotes "not asked/no answer) (* denotes insufficient sample size to report findings).

3.1.8 Outdoor Activities

During their trip to BC, non-resident visitors partook in a number of outdoor activities with one-half taking part in wildlife viewing/bird watching and 43% visiting National or Provincial parks. Sixteen percent went freshwater or saltwater fishing. In addition, many non-resident tourists visited attractions such as historic sites (43%), art galleries/museums (28%) as well as First Nations cultural sites (26%)[6].

BC residents travelling in BC also partake in outdoor activities with 41% participating in sightseeing and 33% participating in wildlife viewing/bird watching. About 24% partook in hiking/backpacking and nearly one-third (31%) visiting attractions such as historic sites. Results are shown in Table 3 on the next page.

Table 3: Outdoor Activities Undertaken in Northwest BC

Outdoor Activities Undertaken	Overnight Visitors		
	Non-Resident	BC Resident	
	Total %	Total %	North %
(Net) Land-based activities	59	47	40
Visiting National/Provincial Park	43	19	17
Wildlife viewing/bird watching	50	33	30
Hiking/Backpacking	14	24	19
(Net) Winter Activities	1	3	6
Downhill skiing/snowboarding	1	3	5
*(Net) Fishing***	16	19	17

[6] The reader is referred to Appendix A this report for a more detailed analysis of the cultural interpretation market.

Saltwater fishing	5	—	—
Freshwater fishing	15	—	—
(Net) Boating (BC Residents)	—	14	13
Photography	46	38	27
Sightseeing	—	41	34
Golfing	3	12	12

** Note: Among non-resident visitors, this includes both fresh and saltwater fishing. For BC resident visitors this represents all fishing and it is not possible to break this out on a freshwater and saltwater basis (— denotes 'not asked/no answer')

3.1.9 Visitor Spending Profile

The single largest proportion of expenditures by non-resident visitors went towards package tours purchased in BC (28%). This was driven predominantly by Long Haul/Overseas visitors, 35% of whom purchased packages. These visitors spent comparatively less on food and beverage expenses (14%) and accommodations (11%) — most likely because these items were included in the package tours they purchased.

Food, beverages and accommodation represent nearly one-half of the total tourism monies spent in BC (46%) by close-in 'other' Canadians and US visitors. A substantial proportion of expenditures for this market also went towards transportation (18%) and package tours purchased in BC (16%).

Food, beverages and accommodation represent one-half of the total monies spent in the Northwest region by resident visitors. These visitors spent an additional 15% on accommodations while

travelling in the region.

Table 4: Visitor Spending Profile in Northwest BC

% Distribution of Total Expenditures	Overnight Visitors				
	Non-Resident			BC Resident	
	Non-Resident Total %	Regional Can & US %	Long Haul & Overseas %	Total %	North %
Food & beverage	19	27	14	30	27
Accommodations	14	19	11	18	15
Transportation	16	18	14	21	23
Souvenirs & gifts	6	7	5	7	7
Package tours purchased in BC	28	16	35	*	*
Outdoor activities	3	3	3	6	7
Attractions & cultural events	1	1	—	5	4
Other expenses	15	9	17	12	16

Non-resident expenditures represent all expenditures while in the province. BC resident expenditures represent only expenditures in the region. (— denotes less than 1%) (* denotes package expenses for BC resident visitors were considered pre-trip expenditures and were not included in the visitors' expenditures while travelling in BC).

3.2 The Value of Tourism to BC

3.2.1 Expenditures[7]

Tourism revenue totalled $8.8 billion in 1998, a 2.9% increase over 1997. A major component of this growth came from the US market (up 11.7%), whose tourism expenditures injected a total of $2.2 billion into the provincial economy. Positive revenue growth in 1998 was also seen from the BC, Canadian and European markets, up 1.5%, 2.9% and 2.2% respectively. The above revenue increases more than offset a 12.9% revenue drop from the Asia/Pacific region.

Visitor spending among key markets varied with the length of stay and per day expenditures. For

[7] Statistics in this chapter are sourced from: *The Value of Tourism*, an information brochure generated by the TBC Research Services, 1999.

example, BC residents represented 49% of total visitor volume last year but only 27% of the revenue as they spend less on average per visit than the longer haul visitor[8]. Conversely, overseas visitors contributed 17% of the total revenue while representing only 8% of the volume.

3.2.2 Target Market Volumes

In 1998, BC hosted 21.8 million overnight visitors -- an increase of 1.9% from 1997. Nearly half (49%) of these visitors were BC residents. Travellers from other parts of Canada accounted for 4.7 million visits (21.8%) a 1.5% increase over the previous year.

A strong US economy, a growing awareness of BC as a preferred travel destination and a very favourable exchange rate combined to lure Americans to BC in record numbers in 1998. There was a 10% increase over 1997 and a 29% increase since 1994.

Australia and Hong Kong were the only Asia/Pacific countries to show positive growth in 1998, up 4.8% and 5.3% respectively. Slightly more Europeans visited BC in 1998 (up 1.1%), driven mainly by the 7% growth from the UK market. The number of UK visits topped 238,000, nearly doubling the second largest market of Germany with 129,000.

3.2.3 Employment

In 1998, 112,940 people were directly[9] employed in BC's tourism industry, ranking it fifth in provincial employment and ahead of all of the goods-producing (resource-based) sectors. Tourism employment in BC accounts for approximately 1-in-12 jobs in the province. Growth in tourism employment rose 31% in the ten year period from 1989 to 1998, approaching nearly double the provincial average of 19%.

3.2.4 Tourism GDP

Based on a 1992 constant dollar, Tourism GDP rose 1.2% in 1997, over the previous year, to a total of $4.1 billion. Tourism accounted for 4.8% of the provincial Total GDP of $86 billion. When compared to resource-based industries, Tourism's GDP in 1997 was greater than mining, agriculture and fishing and behind forestry. Tourism GDP grew significantly in the five-year period from 1992 to 1997, up 15%.

3.2.5 Tourism: The Importer of the Exporting Sectors

Whereas traditional export industries ship commodities to markets in other countries, in tourism the consumers travel to BC to purchase the product -- *Super Natural BC.*

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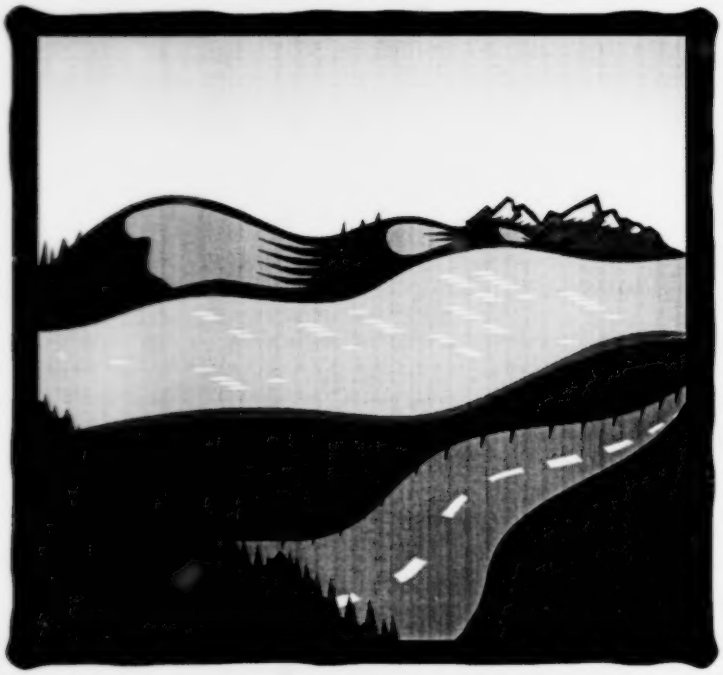
[8] This does not account for any 'outfitting' expenditures BC residents spend in pursuing their various recreational activities (i.e.: equipment, clothing, education & skill development, etc.)

[9] If indirect employment is factored in, total direct and indirect employment has been estimated at about 250,000.

In 1998, $3.7 billion of BC's tourism revenue was earned in foreign exchange. This was an increase of 4% from 1997, and a 55% increase since 1994. Last year, tourism was the second-largest earner of export income in the provincial economy, after wood products.



4 TOURISM TRENDS

Whether one is marketing a complete tourism destination (such as British Columbia), a specific tourism activity within a destination (such as wildlife viewing or hiking) or simply one or two visitor products within a destination, it is important that one does not market from within a limited scope or target market awareness. It is vitally important that there is an understanding and cognizance of the global, national and regional tourism trends as well as any shifts in travel patterns, purchasing processes or demographics and psychographics as they pertain to a destination's target markets.

The travelling consumer of the here and now (let alone in the future) is very different from any other time in history. The most successful in the travel industry are those that respond to the challenge through the use of technology, innovative marketing programs, better training of staff and by developing a closeness and understanding of its customers/guests. The differences in travel patterns in the next century will be more related to what consumers are seeking in a travel experience than in how they travel.

In *Tourism, Technology and Competitive Strategies*, author Auliana Poon speaks about the changes in consumer behaviour and values which are the critical driving forces for the new tourism (Table 5). The new tourist is experienced, more flexible, independent, quality conscious and harder to please.

Table 5: Old and New Tourists Compared

Old Tourists		New Tourists
search for the sun	⇨	experience something different
follow the masses	⇨	want to be in charge
here today, gone tomorrow	⇨	see and enjoy but not destroy
just to show that you had been	⇨	just for the fun of it
having	⇨	being
superiority	⇨	understanding
like attractions	⇨	like sports
precautions	⇨	adventurous
eat in hotel	⇨	try local fare
homogeneous	⇨	hybrid

Source: Tourism, Technology and Competitive Strategies, Auliana Poon.

Travel is no longer a novelty to the new tourist. Studies support what industry executives have been noticing for the last few years. People expect more out of their vacations than they used to and they

are more adventuresome.

Surveys done by the Canadian Tourism Research Institute indicate a high degree of interest in getaway vacations, ecotourism, cultural tourism and combining a business trip with a pleasure trip.To follow is an examination of global market trends which are of relevance (Chapter 4.1) followed by a review of Canadian & US tourism market trends (Chapter 4.2).

4.1 Global Tourism Trends

In the effort to provide up-to-date and relevant tourism statistics and trends from a global perspective, accessing timely statistics has always been a challenge. Without question, one organization that collects and collates pertinent tourism data is the World Tourism Organization (WTO) and affiliated organizations such as The Travel Research Association (TTRA).

During the past few years a series of dramatic events around the world is changing the global, political and cultural environment in a way that is certain to effect the future growth and prosperity of the international tourism industry. These events include, but are not limited to: a new accord between Russia and China; the signing of the NAFTA agreement; the end of apartheid in Africa; the emergence of North Korea as an economic powerhouse; the government liberalization program in India; a cease fire in Northern Ireland; the signing of peace accords between Israel, Jordan and Palestine; an intense civil war in the once Yugoslavia; continuing civil wars in Africa, Southeast Asia and Cambodia, etc.

Most economists agree that there is a close correlation between the growth of a nation's economy and the amount of travel generated by its citizens. Today, the economic news from most regions of the world is strongly positive. With most of the world's population living in countries that are showing substantial economic growth, the last half of the 90s' was a bright period in the history of world tourism.

In short, while there are many international issues worthy of serious concern, the overall growth and stabilization of emerging economies bode well for global tourism growth.

Without getting into an intense level of detail, to follow is a brief synopsis of global tourism trends of relevance to the Canadian tourism industry:[10]

- gross output of the world's domestic and international tourism industry in 1994 was estimated to have reached $3.4 trillion. This includes $2 trillion spent by consumers, $352 billion by governments, $401 billion by business, and capital investment of $693 billion. These estimates indicate that tourism is without doubt the world's largest industry;
- world-wide international arrivals in 1993 increased by 3.4% to 500 million (WTO);
- in the United States in 1993 inbound foreign visitor arrivals declined 3.7% to 45.8 million. This was the first decline in nine years. Canadian arrivals were down by 6.9% while arrivals from overseas countries were up by 4.9%;
- in 1993, outbound Americans travelling to foreign countries increased 1.1% to 44.4 million.

Travellers visiting Canada were up by 1.5% and travellers to Mexico declined by 5.1%. US

[10] Somerset R. Waters, Travel Industry World Yearbook: The Big Picture 1994-95, Child & Waters Inc., 1994

travellers visiting other overseas countries were up 7.1%; and

- in 1993 the Americas reported arrivals up 5.3% to 106.5 million, with receipts up 4.7% to $87.5 billion. There was a strong increase in arrivals from Europe.

In addition to the above statistics, how people travel and what people are looking for in travel destinations has been changing on a fairly consistent basis for the past decade. The "greening" of people's attitudes world-wide, leads to the following tourism trends.

Over the next ten years, tourism products and attractions will have to cater to visitors who are more demanding and discriminating, as well as more active and more purposeful in their choice of destination. There will be a shift in emphasis from passive fun to active learning, and the quality and genuineness of visitor experiences will be crucial to future success in a competitive market.

Key shifts in global tourism market trends are summarized below:

- in the long term, the average standard of living in western developed countries will increase, as will the amount of discretionary money available for travel;
- rising affluence will bring with it increases in the amount of free time available. Longer weekends and increased paid holidays have helped to stimulate expansion in attraction visitation;
- there is a shift in emphasis from passive fun to active learning;
- activity or special interest holidays are likely to gain at the expense of conventional sightseeing, visiting and other passive experiences;
- there is growing concern about the impact of modern industry, including tourism, on the physical and social environment;
- there is growing awareness of risks to personal health and safety;
- leisure time will be used more actively, for mental development as well as physical exercise;
- people aged 45 to 64 years of age will be growing significantly in number to the year 2010. In the United States alone, this age group is forecasted to grow by 31% by the year 2000;
- the potential visitor of the future will be: older, more affluent; more demanding; more thoughtful and discriminating; and more active physically and mentally;
- decision making windows will be smaller. Hence, one-stop-shopping for all-inclusive packages will continue to be appealing; and
- consumers will increasingly seek low impact tourism facilities, consistent with environmental values and the desire not to contribute to negative impacts.

4.2 Canadian & US Trends

4.2.1 Inbound Travel

Since 1980, Canada has ranked among the top ten international tourist destinations both in terms of overnight visitors and receipts. More recently, between 1985 and 1993, the number of international visitors to Canada grew by 1.7% per annum, while receipts grew by 7.9% per annum. In 1993, tourism contributed $27.2 billion to the Canadian economy and accounted for approximately 592,800 tourism-related jobs. Tourism is Canada's fifth-largest export industry after motor vehicles and trucks, business services and lumber.

Next year when the first of the baby boomers begin to slide into their 50s — the demographic start

for two prime decades of leisure travel — tourism is expected to boom.[11] In the next decade, a study by the federal labour ministry estimates that tourism-related employment will grow as a rate almost double that of the rest of the economy, as long as the value of the Canadian dollar does not rise much more than five cents above its current level (based on $0.73 US).

Many countries see Canada as a "hot" tourist destination. Travel to Canada from overseas countries was up by nearly 12% in 1996. Significant increases from Asian countries such as South Korea, Taiwan, China and Thailand of 30-40% annually were recorded. South Korea is already a larger market for Canada than either Italy or the Netherlands.

Of the main inbound markets, Japan is expected to provide the largest increase in pleasure travellers to Canada between 1996 and the year 2000. The Conference Board of Canada forecasts for the Canadian Tourism commission show an increase of 54% from the Japanese market and 12% from the US pleasure travel market.

The US market, Canada's largest inbound travel market, has given a disappointing performance even with the low Canadian dollar, the Open Skies agreement and positive growth in the US economy. In 1996, trips of one night or longer declined slightly when a more than 3% increase was expected. One reoccurring theme from tour wholesalers is that *...prices are getting too high for accommodation and food.*

Other statistics show that:

- in 1993, some 20.6 million Canadians took trips to other countries and stayed overnight. This was a decline of 5.2% from 1992. Those visiting the US declined 6.9% to 17.3 million. Some 3.3 million Canadians travelled to overseas destinations in 1993, a large increase of 5.3%;
- in 1994 foreign visitors spent $10 billion in Canada while Canadians spent $16 billion travelling abroad, giving Canada a travel deficit of $6 billion;
- total arrivals of foreign visitors staying overnight in Canada in 1993 increased by 2.3% from 1992 to a total of 15.1 million. Overnight visitors from the US increased by 1.5% to 12 million. Overseas visitors increased 5.6% to 3.1 million;
- in 1993, Canada's world-wide travel receipts from visitor spending totalled $27.2 billion. Of this, $18.4 billion was generated by domestic tourism and $8.8 billion was generated by international tourism;
- all of Canada's primary markets grew in volume in 1994 with the US market up 4.1% and the total overseas arrivals up 11.1%. This is further broken down to show that the United Kingdom is up 2.3%, Japan +18.1%, France +13.4% and Germany +8.2%;
- in terms of revenue, 1994 figures show that of all overseas tourism receipts Japan provided the highest percentage at 17%, followed by the U.K. at 13%, France at 13%, Germany at 11%, other Europe at 16% and other Asia at 16%;
- during the past seven years, US visitors to Canada have failed to regain the peak of nearly 14 million arrivals in 1986; and
- the US market currently provides Canada with 79% of its international tourists and 64% of its international revenues. The average stay for US visitors is one week.[12]

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[11] *For Fun And Profit*, Maclean's Magazine, August 7, 1995.

To encourage more foreign tourists and to help overcome the reluctance of Canadians to travel within their own country, the federal government replaced the Tourism Canada agency with the Canadian Tourism Commission (CTC). The commission, a joint government and industry agency, has a year 2000 budget of about $65 million — up $41 million from the last Tourism Canada budget prior to the formation of CTC of $14 million — to promote Canada as a tourist destination both at home and abroad.

4.2.2 Canadian Domestic Travel

Recent CTC marketing campaigns directed at *Canadians visiting Canada* are apparently well targeted as the domestic market has shown a rebound in interest in visiting Canada. Conference Board of Canada research shows that there is a high degree of interest among Canadians to visit the coastal and northern areas of the country. This growth in the domestic market has spurred the interest of Canadian tour operators. New packages aimed at the domestic market are being offered by many domestic companies. Domestic tourism appears to be on an upward trend that will continue beyond the year 2000.

4.2.3 The Changing Consumer Profile

Population growth, immigration and an ageing population will continue to have profound impacts on the travel industry in North America.

Canada's population is expected to grow from nearly 30 million in 1996 to 37.3 million by 2011[13]. At the same time the median age of the population will increase from 35 years of age to almost 39 years of age reflecting the rapid ageing of Canada's population. The segment of the population which will grow the most during the period 1996 through 2011 will be the 55-64 year olds. This group will expand 77%.

4.2.4 Ageing Trend a Boom

One third of Canada's population is in the baby boom category. For this reason they heavily influence product and services. As we enter the next century, the ageing trend of the population should benefit the travel industry in a substantial way. By the year 2011, the age group of 44-64 year olds will number 10.2 million, up from 6.4 million today. Another group with significant potential during the next decade will be the 75+ age group.

The population in the United States is expected to grow from 264 million in 1996 to 300 million by the year 2010. Like Canada, the population growth will be distributed differently throughout the country. The Northeast and Northwest of the country, which includes states such as New York, Pennsylvania and Maine, will grow at a much slower rate than the rest of the country. States that will record significant growth include Texas (29%), Florida (29%), California (33%) and Georgia (26%).

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[12] Ibid. #1 plus *Canadian Travel Trends and Forecasts*, Tourism Canada, February, 1995.

[13] The Conference Board of Canada, Canadian Tourism Commission & Baxter Travel Group, *Travel Forecast 2000*, May 1997.

Canada's tourism marketing program is aimed at the following US age groups: 35-44, 45-54 and 50+. The Canadian Tourism Commission's (CTC) marketing budget directs 65% to the 45+ market in recognition of its size and importance for future travel. Only 20% is allocated for the 35-44 age segment. The growth in these segments coupled with their high propensity to travel, bodes well for operators who depend on inbound travel from the United States.

4.2.5 United States Minority Populations: An Opportunity on the Threshold

The more than 70 million consumers who make up the African-American, Hispanic and Asian American markets account for well over $500 billion in spending power according to Marlene Rossman, author of *Multicultural Marketing: Selling to a Diverse America.* The growth in the ethnic American markets into the next century will be phenomenal. By the year 2050, ethnic groups are expected to represent almost half of the population in the United States.

Tourism operators have increasingly focused on capturing ethnic markets. Compared with all travellers, the US Travel Data Centre reports in *The Minority Traveler* that this group spends more on their average trip, are slightly more likely to stay in commercial accommodation and have a higher propensity to shop during a trip.

To succeed in the US market in the next millennium, it is clear that tourism operators will increasingly need to appeal to the fast growing ethnic population.

4.2.6 The Changing Family Structure

In both Canada and the US, family structures are changing rapidly. North American sectors of the travel industry that market to "traditional families" are finding more competition than ever. This should come as no surprise — it's imply becoming a smaller demographic group. Increasingly, families are more diverse and less child oriented.

Family households whose head is less than 35 years of age will make up just 15% of family households by the year 2016. This represents a decline from nearly 26% in 1991. "Young family" households will decline from 1.9 million to 1.5 million during this time period. Most important will be the need for operators to differentiate themselves from their competition in the travel products they provide.

4.2.7 Empty Nesters Looking for Adventure

The year 2036 marks the time when the trailing edge of the baby boom reaches age 65. Until the year 2016, the baby boom generation will move from the "young family" part of their lives to becoming "empty nesters". Mortgage — and kid-free, this group will number nearly 34% of family households by the year 2016. Already numbering 1.5 million today, empty nesters will grow by nearly 35% to the year 2016.

The travel industry will be fighting over this lucrative and fast-growing market. Known for their hedonistic ways — pleasure and happiness rule — and willingness to travel afar, this market will be spoiled like never before with a deluge of new products and services to make travel more convenient, affordable and exciting. Having followed a hedonistic lifestyle, these ageing baby boomers will expect travel experiences which are not only hassle-free but which add value to their

lives and experiences. Romantic, cultural, educational and adventuresome experiences will appeal to them. The "been there, done that" syndrome will drive tour companies to design more exotic and unusual travel adventures.

4.2.8 Economic Trends Lead Travel Industry

The travel industry in North America will surely prosper thanks to steady growth in the economies of Canada and the United States and what can only be called spectacular growth in Pacific Rim countries.

It is expected that inbound and outbound travel between North America and the pacific Rim countries will continue to grow at double-digit annual increases well into the next millennium. The growth in the middle class in these countries along with improved air access and the easing of visa restrictions will facilitate outbound travel from the Pacific Rim countries. Canada had a 17% increase in visitors from Asia in 1996. However, this does not even compare with south Korea and Thailand which led the way with increases of more than 41%.

4.2.9 Wealth & Discretionary Spending

As one can appreciate, and as morbid as it sounds — as the baby boomer generation lines up to hear the reading of their families wills over the next few years, travel operators would be well advised to look for ways to help them spend it. As we look into the next millennium, there are a number of factors that will affect Canada's travel industry. Some will be positive while others are going to hurt.

On the negative side, an appreciating Canadian dollar, something that most economists agree will occur, will result in fewer international visitors and more Canadians travelling abroad. This country's low savings rate is another factor that could eventually haunt this highly discretionary industry. With savings cut to the bone and consumer debt at record levels, many Canadians would be left reeling if, as expected, interest rates increase. Spending on travel would take a severe hit in this scenario.

On the positive side, there is a factor that, while difficult to quantify, could provide a timely boost to the industry in the early part of the next century. Put bluntly, the generation born between 1900 and 1940 is starting to pass on. Many people born in this period did very well financially as they say the value of their houses as well as other assets dramatically appreciate in value. Demographer David Foot estimates that over the next two decades, as mush as $1 *trillion* will be handed down from Canadians now over the age of 55. What baby boomers will do with this money is an interesting question.

The travel industry could also gain from this large transfer of money from one generation to another as the industry should receive a good chunk of the inheritance funds based on a combination of demographic trends and how people like to spend their money.

With a lot of leisure time on their hands, the demand from baby boomers for leisure activities like travel will expand. Money inherited from their parents will enable boomers to travel even more than they would have hoped.

The case put forward that Canadians want to spend on travel is strengthened by a survey conducted by the Royal Bank in which Canadians were asked about their intended purchases in 1997. The results were analyzed by demographic groupings and compared against a similar survey conducted in 1995. Overall, 67% of respondents picked vacations as their top spending choice for 1997. Travel

surpassed making contributions to an RRSP, buying furniture, making other investments and home renovations.

5 STUDY AREA PROFILE

5.1 Geographic Description[1]

The Kalum Forest District covers an area of about 3.8 million hectares in Northwestern British Columbia. The Skeena River flows through the lower third of the district. The northern boundary reaches to the headwaters of the Nass River near the southern boundary of Spatsizi Plateau Wilderness Area. The area extends south to the Kitlope Park Heritage Conservancy Protected Area. The south-western corner also cuts through Hawkesbury Island in the Douglas Channel (Exhibit 1).

The topography of the Kalum Forest District is varied, from mountainous and rugged terrain in the south to the picturesque mountain valleys in the north. The southern landscape is dominated by the rugged Coastal Mountains, shining fjords, and salmon-bearing rivers. There are several large lakes in the district: Bowser lake, Lava Lake, Kitsumkalum Lake, Lakelse Lake, and Meziadin Lake.

5.2 The People and Communities

The Kalum Forest District contains approximately 36,000 people[2]. The greater Terrace area, encompassing the city of Terrace and the community of Thornhill, has a population of about 27,000. It is the largest community within the District and the supply and distribution centre for the area. The industrial community of Kitimat boasts a population of about 12,000 people. The District of Stewart has a population of about 1,500. Other smaller population centres include a number of First Nations communities located throughout the district. There are also numerous rural settlements. Population projections suggest the district will grow at a rate of about 1.4% a year over the 1995 - 2000 period.

Five First Nations people consider this area their ancestral home. The population of the Tsimshian, Nisga'a, Haisla, Gitxsan and Gitanyow Nations number about 4,200 people, about 12% of the total area population. Much of this population resides in the villages of Kitselas, Kitsumkalum, Gitalkdamix, Gitwinksihlkw, and Kitimaat. These five communities consist of 65 reserves covering close to 5,000 hectares. All of these First Nations are involved in treaty negotiations.

To follow is a small scale map geographically outlining the Kalum Forest District which serves as the study area boundaries for this project (Exhibit 1).

Exhibit 2: Study Area Map — Kalum Forest District

5.3 Study Area Economy

The population of the Kalum LRMP area grew approximately seven percent to 41,500 between 1991 and 1996, less than the province as a whole which grew at 13.5 percent. Despite the slowdown in

[1] Unless otherwise specified, information in the Study Area Profile is sourced from the web page for the Ministry of Forests, Kalum Forest District (www.for.gov.bc.ca/prupert/district/kalum/page2.htm).

[2] Statistics Canada 1996 population figures for census subdivisions (municipalities) are as follows: Terrace - 12,779, Kitimat - 11,136, Stewart - 858, and New Aiyansh - 739.

the forest industry and the economy in general, the population continued to grow in 1997 at an annualized rate of two percent. However, this rate of increase is forecast to slow in the future as economic change and an increase in the population's average age (which slows the rate of natural population increase) exert downward pressure.

As with most resource communities, the average age of the Study Area population is lower than the provincial average age. This is because there are significantly more young people in the community. Thirty-four percent of the population is under the age of 20, whereas this age group accounts for only 24 percent of the provincial population. The percentage of population in the 20 to 44 age class is the same in the Study Area as the province. The older age classes represent a lower proportion of the total population, 26 percent in the Kalum LRMP area versus 36 percent for BC.

The labour force in the Study Area has a lower level of educational achievement than BC. Approximately 39 percent of the labour force has less than a high school graduation, compared to 31 per cent in BC. In contrast, the region has fewer workers with some university education, 14 percent, compared to BC at 25 percent. The region's labour force does have a slightly higher proportion of workers with trade certificates and diplomas, presumably because of the predominance of primary sector economic activity and employment.

The Study Area has higher incomes than BC both in terms of individuals and households. Kitimat has average individual and family incomes that far exceed the provincial average while Terrace, though less than Kitimat, is still higher than the provincial average. The prevalence of public sector and major industry payrolls offer some explanation for the high income levels. As the service sector increases its share of the labour force employment, average incomes could fall.

Like most of the Northwest, the Study Area economy is resource-based. According to the 1996 Census, the public sector was the most important sector, followed by forestry, mineral processing, retail, construction, tourism and transportation/communication. General economic and labour force trends observed in the Kalum LRMP Socio-economic Base Case for the 1981 to 1991 period were seen continuing through to 1996. These include a diminishing role for manufacturing employment (29.6% in 1981, 21.7% in 1991 and 19.0% in 1996), where wood, pulp and metal industries all contributed to the decline, a modest diminishment in logging and forestry activity, and increasing levels of service sector employment. There was some differences evident in the performance of key service sector categories — public sector employment grew as a percentage of the total labour force, but retail and tourism saw their proportions decline.

During the 15 period beginning in 1981 and ending in 1996, the critical goods producing sectors (i.e. primary and manufacturing), which provide the majority of community wealth, have gradually but continuously lost share of the Kalum's total labour force to service industries.

5.4 Economic Structure[3]

Employment in the district reflects the importance of natural resources to the District's residents. The service sector is gaining in importance, but its strength is heavily tied to the goods producing sector. Twenty nine percent of the jobs in the Kalum Forest District are in the public sector, the largest employer by sector. Forestry follows with 25% of the jobs. The minerals industry, mainly the Alcan Smelters and Chemicals Ltd. aluminium smelter in Kitimat, provides 19% of the employment

[3] Cited in: Kalum Forest Recreation and Tourism Opportunities Study, prepared for Kalum LRMP, Clover Point Cartographics and Geoscape Environmental Planners, February, 1999, page 3.

in the district. Alcan depends on the hydro electric power produced at a generating station in Kemano, a small community Southeast of Kitimat. Manufacturing and transportation account for another 14% of employment in the district, followed by tourism which contributes 10%.

Fishing and agriculture are small but important sectors of the economy, providing additional diversification and stability within the communities. The relatively mild coastal climate and rich valley bottom soils provide conditions that are favourable for agriculture. Many of the southern river valleys average 130 frost free days per year and the average annual rainfall is over 100mm. However, the amount of land suitable for agriculture is quite limited. In total, approximately 200 people make their primary income from mixed agriculture, mainly horticulture (fruits, vegetables and greenhouse crops), livestock, and poultry rearing. Commercial salmon fishing employs about 110 people. The Skeena, Nass and Kitimat River systems have important salmon runs for all five species of salmon as well as steelhead.

5.5 Significant Land Use Planning Factors

5.5.1 Commercial Recreation Tenure

As global and national travel markets continue to expand and focus on resource-based activities, there will be more demand for adventure tourism products in the Kalum study area. Forecast trends in outdoor recreation indicate that increasing use of the backcountry for motorized and non-motorized adventure recreation will continue. Commercial recreation operators have responded to this new demand by developing new products and markets and by ensuring that they have some security of access to the Crown land base with which to support their activities. As their investment in resource-based tourism products rises, operators will find it more important to obtain Crown land tenure to ensure a consistent, ongoing visitor experience.

In BC, *Commercial Recreation (CR) on Crown Land Policy* designates BC Assets and Land Corporation (BCAL) as the agency responsible for ensuring equitable and sustainable allocation of Crown land tenure for commercial recreation. Consistent with this mission, planning work has been conducted around the province to formulate management prescriptions and streamline the decision-making process. At the same time, BCAL has faced mounting pressures to increase community and commercial user access to Crown tenures without having had the opportunity to refine their assessment mechanisms.

This has led to numerous problems associated with policy interpretation (e.g. what constitutes a fee for service operation?), the distinctions between the various lease, licence and permit categories, overlapping tenures, commercial user conflicts, the referral process, the duration of the application process, among others.

To facilitate commercial recreation development in the Kalum area, communities and tourism stakeholders should be working with BCAL to refine its tenure management responsibilities for the benefit of all residents. Initiatives occurring elsewhere in the province could be applied locally to this end.

- In Squamish, BCAL has prepared a Management Plan for Commercial Recreation which basically zones (provides management guidelines) motorized, non-motorized, winter and summer commercial recreation activity in the plan area, as well as stipulating mitigation measures and management principles. Such a plan in the Kalum would give BCAL a much better information baseline that it currently has.

- In the Robson Valley, BCAL has issued a RFP inviting developers to develop the Canoe Hotsprings resort in Valemount. This proactive initiative was undertaken in conjunction with the District of Valemount and has allowed decision-makers to pre-qualify Crown lands for commercial development rather than responding to new applications.

5.5.2 Recreation & Tourism Planning and the Nisga'a Treaty

Nisga'a lands make up 1,992 square kilometres of land, encompassing all four Nisga'a Villages and specific attention to tourism and commercial recreation form a part of the overall Nisga'a treaty.

On the effective date — which could easily be April 1st, 2000 — the Nisga'a Nation owns the "full" fee simple estate in Nisga'a lands. Under Canadian law, the full fee simple estate is the largest and most complete interest in land that can be owned by any subject of the Crown. Most private land owners in the province have a "limited" fee simple estate, under which BC owns the subsurface and the roads, can "resume" 1/20th of the land, and has other rights such as the right to take sand, gravel and timber. The Nisga'a Nation's fee simple estate is not subject to any of these limitations[4].

Over ten percent of the region's[5] employment results from tourism which serves mostly the touring and outdoor recreation market. Angling guides and outfitters currently operating on Nisga'a lands will not be affected under the terms of the AIP (Agreement-in-Principle). Backcountry recreation tenure and angling guide licence provided to the Nisga'a under the terms of the AIP could support at least ten jobs annually and generate $300,000. Increased traffic to Nisga'a lands would raise revenues for other tourism businesses in the region.

5.5.3 Nisga'a Commercial Recreation Tenure

The Nisga'a commercial recreation tenure is a licence issued by BC under provincial law and based on an approved Management plan. Under the Management plan, the Nisga'a Nation can conduct guided hiking and wildlife viewing activities within the tenure areas on a commercial basis.

The Nisga'a commercial recreation tenure has an initial term of 27 years. For seven years after the effective date the Management Plan will be phased in and BC cannot issue another commercial recreation tenure within the tenure areas that conflicts with the Management Plan for the Nisga'a tenure. Treaty clauses pertaining to Nisga'a commercial recreation tenure are shown in Exhibit 2. below:

Exhibit 3: Commercial Recreation Tenure Clauses Within the Nisga'a Treaty

5.6 Kalum Forest District — Tourism Analysis

5.6.1 Regional Tourism Indicators

While there is not any formal, on-going accounting for tourism statistics and/or trends either within

[4] Source: Nisga'a Nation Web Page : http //www.nyc.bc.ca/treaty/lands.htm

[5] Nisga'a Treaty area

the immediate study area or within the Northwest BC region, the following tourism trend indicators pertain specifically to the Kalum Forest District and Northwestern BC — as provided by local tourism operators and professional experience[6]:

- The apparent "fishing crises" generated by the Department of Fisheries and Oceans has had immediate, dramatic and lasting negative impacts on both resident and non-resident anglers. Visitor fishing numbers are substantially down for the 1998 & 1999 fishing season over previous seasons due to the uncertainty in the marketplace regarding the catching and keeping of fish[7]. There is misinformation in the marketplace which is continuing to confuse potential visitors -- hence a drastic drop in the sport and recreational fishing subsectors;
- group travel throughout the Northwest region of BC is substantially down while the FIT market (independent traveller's utilizing a personal vehicle) appears to be growing. This supports global tourism trend analysis which states that people are more and more seeking travel experiences which allow them to explore when and where they wish;
- interest in, and participation in exploring and viewing the Nisga'a Memorial Lava Bed Park and volcano is growing;
- the uncertainty regarding land-use policies is limiting growth in the private tourism sector (i.e.: the ongoing revising of the Commercial Backcountry Recreation policy, the uncertainty of local First Nations land claims process & the uncertainty of resource use management regimes in the Kitlope and Nass Valleys);
- visitation to local Tourism InfoCentres appears to be stable[8];
- many tourism operators are expanding the types of travel experiences they are offering. For example, many fishing guides and charter operators are diversifying their products to include soft adventure opportunities; and
- the continuation of a recession climate in BC will have direct and dramatic effects on the local & regional tourism industry[9].

5.6.2 Regional SWOT Analysis For Tourism Development

As part of earlier studies looking into the economic status of the Kalum Forest District, regional tourism SWOT analyses were undertaken in an effort to get a handle on the issues, concerns and opportunities facing the tourism industry of the region. The overall SWOT results generated in this earlier research for the study area are listed below:

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[6] Research undertaken by the proponent while undertaking the study entitled: Economic Development Opportunities/Barriers: Forest-related Resources in the Kalum LRMP Study Area, Crane Management Consultants, Meredith & Associates and Majestic Forest Management, 1998.

[7] as reported by tourism sector operators

[8] this observation must be qualified as funding formulas tied to visitation numbers has led many InfoCentres throughout BC to "pad" visitation numbers in order to retain historical funding levels.

[9] about 45% of all provincial tourism revenues are generated by residents of BC. With many residents suffering from the recession, spending on BC holidays and recreational equipment will continue to decline.

Table 6: Regional Tourism SWOT Analysis

Tourism Strengths for the Kalum Forest District	
raw tourism product inventory which matches present & future tourist demands	small — yet in-place receptive tour operator infrastructure capable of servicing tourist needs
relatively easy access to the immediate area via: vehicle, air, ferry & motorcoach	world-class fishing product (both salt & fresh water)
unique native cultural & heritage products	growing awareness of Northwestern BC as a desired tourism destination
present US $ exchange rate	
Tourism Weaknesses for the Kalum Forest District	
overall lack of built and/or developed tourism facilities	lack of 'critical mass' of tourism operators with which to collectively market local tourism opportunities
very limited number of tourism suppliers	little or no support/leadership/direction from Provincial Government for tourism sector
undercapitalized and under developed mix of tourism products	lack of awareness in marketplace of local/regional tourism opportunities
the location of Terrace acts to discourage overnight visitation	
lack of "circle tour" product due to poor road condition (Canyon City to Cranberry Crossing/Highway #37)	
Tourism Threats for the Kalum Forest District	
uncertainty of land claims	continued negative image in the marketplace regarding fishing policies
uncertainty of both Provincial and/or Federal fisheries policies	conflicting land-use regimes
continuation of BC recession	poor investment climate
reintroduction of commercial fishing in the mouth of the Skeena	continuation of Coho closure (lack of opportunity to 'take home' fish)
Tourism Opportunities for the Kalum Forest District	
the development of unique ecotourism products to meet market demands	the development of proactive, ½ day local tour options to attract drive-by and group travel markets
promotion of affordable tour opportunities to immediate close-in region	development of 1st class RV park in Terrace to attract overnight RV market
pending road improvements — development and promotion of Nass Valley circle tour	

Source: Economic Development Opportunities/Barriers: Forest-related Resources in the Kalum LRMP Study Area, 1998.

5.7 Community Clusters — Tourism Development Analysis

A vital component of the Kalum FTOSS study was a detailed review and analysis of tourism issues, concerns and opportunities from more of a "community" perspective than has been done previously. While prior studies examined the tourism status on an overall regional basis, community FTOSS tourism development workshops were undertaken in the four "community-cluster" areas delineated and approved by the IGPT in the beginning stages of this work plan:

- Kitimat/Kitamaat Village;
- Terrace & Environs;
- The Nass Valley; and
- Stewart/Meziadin Junction.

As part of both this Kalum FTOSS study and the Fort St. James FTOS study, an additional tourism development workshop was facilitated with thirteen representatives of the Gitxsan Hereditary Chiefs.

Each workshop group was somewhat unique with particular interests. While the overall intent for each workshop was the same — that is, to identify issues, concerns and opportunities particular to tourism "development" — each workshop developed it's own rhythm and discussion style. Rather than try and stick to a hard and fast format, the participants (tourism stakeholders) at each workshop were encouraged to discuss items and topics that were foremost in their minds. Therefore, each workshop generated slightly different details, but in general, tourism development issues, concerns and opportunities were the focal point for all sessions.

The detailed results generated at each of the five workshops immediately follow this section and are shown in Tables 9 through 14 in Section 5.7.2.

5.7.1 Common Themes From Tourism Development Workshops

While each community-cluster workshop generated a number of comments and suggestions unique to each community or near by area, it soon became abundantly clear that the major tourism development issues, concerns and opportunities were common among all communities.

In recognition that any "tourism development" initiatives undertaken in Northwestern BC — regardless of any particular community or sub-region — are most likely to encounter similar issues or constraints, the following tables (Table 7 & 8) provides an amalgamation of common threads generated at all the tourism development workshops.

Table 7: Common Tourism Development Issues in the Kalum Forest District

Tourism Development Issues & Concerns
Lack of entrepreneurial skill development opportunities
Very limited funding/financing assistance available to new tourism development initiatives
Limited interest in new tourism product development by investors due to "uncertainty" of First Nations land claims
Limited knowledge and awareness of tourism marketing needs by existing or potential tourism operators

Tourism Development Issues & Concerns
Inconsistent and at times poor delivery of tourism products and/or services
Too many local/regional tourism suppliers are interested in "lifestyle generation" verses the development of a proactive and larger form of tourism operation
Regional youth have limited incentive to enter the tourism industry
Limited tourism training opportunities available in the immediate region
The cost of air transport into/from the region greatly limits the development of in-bound tourism destination packages
General lack of awareness and/or understanding of the regional tourism industry by regional residents
Some high profile fishing opportunities are being degenerated due to extensive use
The future of destination fishers is uncertain due to federal and/or provincial fishing regulation amendments — and timing of announcements
A perceived understanding that 'tourism' is a "popcorn" industry with limited economic benefits
A general lack of tourism infrastructure throughout the Kalum Forest District with the Nass Valley suffering from extremely limited infrastructure (i.e.: New Aiyansh just lost the valley's only full service grocery store)
Very limited resources available to assist a tourism entrepreneur in developing a new product or service
A lack of awareness and utilization of existing products or services by the regional resident population
Continuing use conflicts between different sectors of the recreation and/or tourism activity mix
Very limited support of the tourism sector from municipal and/or regional governments
Poor tourism signing throughout region and some roadways are in need of significant upgrading (i.e.: Nass Highway & Cranberry Connector {Nass Forest Road})
Existing tourism operators are small in nature, tend to be apathetic and/or complacent and do not participate in locally generated tourism initiative
Permit and licensing regulations are horrifically confusing and unclear and therefore result in very limited tourism development initiatives
Existing recreation and tourism products are very underutilized and require proactive marketing in order to increase use (prior to new products being developed)
There is a general lack of networking between existing tourism product or service providers
Continuing concerns regarding forest harvesting practices (i.e.: visual corridor management)
Overall lack of 'tourism development resources' available to potential tourism entrepreneurs
Very limited regional/local tourism research statistics available for planning purposes
At times, very negative attitudes among regional residents regarding the tourism sector
Lack of in-bound destination tourism packages available to the travelling public

Tourism Development Issues & Concerns
Very poor record on the implementation of tourism plans and strategies
Government "red tape" greatly hinders any potential for the development of new or enhanced tourism products or services

Table 8: Common Tourism Development Opportunities in the Kalum Forest District

Tourism Development Opportunities
Market existing tourism products and services within the Northwest region of BC (close-in verses long haul)
Should put additional focus to capturing more of the RV market which is already travelling throughout the region
Huge opportunity and dire need to develop additional, interpreted, cultural and heritage tourism products in region
Better use should be made of existing infrastructure and products (i.e.: community facilities such as swimming pools, museums, local artisans, etc.)
Hut-to-hut products should be developed for both inland products (hiking/backpacking) and salt water products (ocean kayaking)
Need to address the overall quality and attitude regarding the delivery of tourism products and services
Regional/local tourism operators should undertake much more networking and package development with fellow tourism product or service providers
Need to promote more "family" type of tourism opportunities for both close-in and long-haul markets
There exists an opportunity to develop a world class health spa product in conjunction with regional hotsprings
Pressing need for communities or region to proactively seek out and encourage larger scale tourism developments with professional tourism developers/operators
With the development of larger scale tourism products (i.e.: larger resorts), local "lifestyle" operators will have an opportunity to increase their business through the partnering and sub-contracting of services to the larger operators
There is a dire need for a 'tourism development manual' designed to assist burgeoning tourism entrepreneurs in planning and designing new tourism products or services
The development of strategically placed "gateways" would greatly assist in developing a regional theme and providing tourist information and directions
Simple and easily attainable front line tourism training opportunities for both management and staff would assist in improving the delivery of tourism products and/or services
The collection and analysis of visitor statistics should be greatly enhanced with communities utilizing a common survey format and methodology so that both 'local' and 'regional' visitor statistics are

Tourism Development Opportunities
generated in order to assist in the planning and development of additional tourism products and/or services Cultural villages and destination lodges should be developed in recognition of the excellent product/market match that these products provide

In recognition that the vast majority of tourism development recommendations are applicable to any of the Kalum community-cluster areas, Chapter 8 of this report is dedicated to fleshing out in some detail a series of tourism development suggestions which should be acted upon by all regional communities and/or tourism entrepreneurs.

5.7.2 Detailed Community-Cluster Workshop Results

To follow in the next six tables are the complete and detailed comments, ideas and suggestions generated at the five tourism development workshops.

Table 9: Tourism Development Workshop — Kitimat / Kitamaat Village

Present Tourism Sector Issues, Concerns & Weaknesses	Tourism Development Opportunities
▸ lack of entrepreneurial skill development in school system – need for students to grow up understanding the development and operation of small businesses ▸ poor attitude of DFO officers (to charter boat operators, visiting fishers {tourists} and local resident anglers) ▸ Kitimat/Kitamaat & Douglas Channel are often left off of tourism maps ▸ "two strikes against the Haisla" due to opportunities targeted at existing operations verses the development of new products ▸ "uncertainty of land claims". First contact with the Europeans – gift of two salmon. Dreams of a co-operative movement of the Haisla. Dreams of land claims benefiting all of BC ▸ Marketing (Time, Knowledge, $) ▸ Proper Packaging of products ▸ Training ▸ Product Delivery (quality; value)	▸ Promotion of Douglas Channel instead of Kitamaat and Kitimat. ▸ Huge Opportunity for Douglas Channel ▸ ocean experiences to an in-region market ▸ saltwater kayaking ▸ RV based recreation ▸ Industry / Technical Tours ▸ Cultural Centre ▸ Heritage, Interpretative products ▸ Golfing ▸ Totem Tours (i.e.: On the Island, Nanaimo) ▸ Year around activities, dedicated to both winter & summer activities ▸ Cultural, Native, "Eco-systems" (i.e.: Kitlope Valley, very specific – Protected area) ▸ very unique eco-systems down the Douglas Channel ▸ Group Tours, including:

- Lack of local "tourism operator association"
- Full-time tourism operations demand huge capital investments and therefore there is a real tendency to develop 1/2 or even 1/4 time tourism initiatives
- Kitimat lacking a central reservation system
- The growing number of youth in the immediate area have no incentive to develop tourism "skills"
- There is a low level of awareness regarding available tourism training opportunities within the region
- Liability insurance premiums are cost-prohibitive

Cost of air transportation into the region greatly limits potential to develop destination products

- Present lack of 1st class RV park/campground
- River access campsites are being deleted by local government agencies
- There is ongoing friction between local resident fishers and tourist fishers
- There is a general lack of awareness or understanding of the tourism sector in the local population
- There are real concerns regarding the overcrowding of hot fishing locations
- There is a lack of awareness of existing tourism products by the local resident population
- Lack of financial capital available for tourism entrepreneurs
- Real or perceived concern regarding the minimal economic impact derived from the tourism sector
- Lack of tourism infrastructure in Kitamaat Village

- Technical
- Fish spawning tours
- Community Products, including:
  - Museum
  - Pool
  - Giant Spruce
  - Heli tours
  - Golf
  - Sightseeing
- Kitimat web page with ability to book
- Hut-to-Hut ocean kayaking (presently there are locals willing to try developing this product)
- River Rafting
- hotspring tours — tie into ocean kayaking
- Drift-boating including river tours
- Need for sport fish processing, smoking & packaging facility
- Need for community to express "welcoming attitude" to visitors
- Need to link tourism packaging with other 'close-in' tourism products (i.e.: Nass Valley)

Table 10: Tourism Development Workshop — Terrace & Environs

Present Tourism Sector Issues, Concerns & Weaknesses	Tourism Development Opportunities
▸ there is a general lack of awareness with local residents regarding local tourism/recreation products & services. This leads to a lack of utilization of local products ▸ there are use conflicts between existing user groups (i.e.: snowmobiling vs x-country or back country skiing in alpine area of Shames Mountain) ▸ there is limited areas for snowmobiling which are easily accessed from Terrace ▸ lack of 'tourism entrepreneurs' in the local area ▸ the City is backing away from direct support for tourism sector ▸ there is concern regarding the short-term (& long-term) survival of the Terrace Tourism Council as this agency is viewed as a very important component of the local tourism industry ▸ location of Terrace does not support the city as an overnight stop (too close to Prince Rupert for folk either arriving or departing via the 2 ferry systems ▸ concern that the 2% hotel tax will never be implemented and therefore long term funding for tourism promotion will be severely limited (was voted down at local referendum) ▸ signing for tourism products is very poor and needs to be upgraded/improved ▸ the Cranberry connector (Nass Valley Forest Road) must be improved if Nass Valley circle tours can ever get off the ground and/or to draw visitors using the Highway #37 corridor ▸ lack of "things to do" for overnight RV and hotel/motel visitors ▸ the timing of Federal & Provincial fishing regulation changes MUST be improved so that potential visitors have enough lead time to plan effectively for their holiday (i.e.: instead of 2 - 4 weeks, advance notice of policy changes should be circulated about 18 months in advance) ▸ local tourism stakeholders are too	▸ need to promote more family type products — places to visit with children ▸ need to promote local history with interpretation and walking tours ▸ should explore the opportunity to promote drop-in workshops and/or traditional artisans such as fish drying huts, carving huts, etc. ▸ opportunity to develop local activity packages to target to "fishers spouses" (for folk that are looking for something to do while spouse fish, golf, etc.) ▸ potential to develop a series of hut-to-hut opportunities which could be shared by a variety or users (hikers, mountain bikers, back country skiers, snowmobilers, etc.) ▸ need to develop/enhance local special events so that they have a regional draw and will attract additional visitors (i.e.: a LARGE summer festival) ▸ perhaps opportunity to upgrade and restore old railway station ▸ perhaps look into the promotion of local "holistic practitioners" and/or the potential for the development of a destination "health spa". As well, there is an opportunity for local holistic practitioners to "partner/package" with local accommodation suppliers ▸ perhaps improve facilities at Ferry Island Campground to better serve large RV market ▸ look into potential to develop a large, full-service RV campground by the private sector ▸ need turning lane to allow easier access to Ferry Island Campground ▸ perhaps look into enhanced river tour products including a paddlewheel boat offering such things as dinner cruises, etc. ▸ perhaps look into the development of a BC Parks Campground at Cranberry Junction ▸ need to develop a local trail system for

apathetic/complacent and do not participate in local tourism initiatives to the degree that they should (i.e.: the TTC is screaming for members) ▸ permit and licensing regulations are horrifically confusing and unclear for potential tourism entrepreneurs (All → federal, provincial, regional, municipal) and this results in minimum tourism development taking place ▸ existing facilities and services are not used to their potential (i.e.: Onion Lake Ski Trails should look into more multiple use opportunities) ▸ the ability/opportunity to operate commercial tourism operations within BC Parks is totally confusing	snowmobiling ▸ in order to help kick-start local tourism initiatives and a further selection of locally generated tourism products, there is a real need to "invite" {well financed} professional tourism developers/operators into the Northwest region in order to develop world class products of a size and capacity to really help put the region on to the international tourism destination map ▸ there is a real need for a "how to manual" for starting a tourism product or service

Table 11: Tourism Development Workshop — Nass Valley

Present Tourism Sector Issues, Concerns & Weaknesses	Tourism Development Opportunities
▸ Access to funding ▸ Economic development planning is a "mute" point if funding to develop opportunities can not be sourced ▸ Funding for training opportunities available for North Coast communities specifically exclude Nisga'a (due to self-government status). This issue has been passed along to TRICOR in PR ▸ Don't discount "maps" as they are valuable planning tools ▸ air travel costs to the north are continuing concern ▸ commercial fishing should not be considered a "threat" ▸ federal (& provincial) policy changes happen way too close to fishing seasons and therefore have huge negative effects on sport fishery ▸ no one takes ownership for maintaining the access road to the lava bed hiking trail and therefore this access route is at times	▸ Nisga'a have plan for full facility RV campground at edge of Nisga'a Memorial Lava Bed Provincial Park ▸ The new Dragon Lake campsite is very popular yet underdeveloped — lots of potential for further development ▸ Good rock climbing but the 3-4 hour trek to location is too far to be practical ▸ Need for "gateway" signing for Nisga'a Highway and Cranberry Junction ▸ Disturbance of geological resources (lava rocks, petroglyphs, etc.) could be minimized through better education and interpretation programs **Comments on top ten product list** Infrastructure non-existent for most top 10 products ▸ Heritage & culture products are missing from the top 10 list. These products need to be "interpreted"

	Tourism Planning Limitations
unavailable ▸ the Nisga'a Highway has a lot of rough patches and Lava Lake section is very rough ▸ there is poor road signing throughout area and very poor signing for existing tourism operations (i.e.: tour opportunities and B&B's).This results in many visitors only finding Nass Camp (Tillicum Lodge) when other opportunities exist ▸ lack of networking between any/all tourism services throughout valley ▸ lack of networking between Nass Valley operators and tour providers in Terrace and/or Stewart ▸ there is a need for a 'Nass Valley Entrepreneur Association' (or Chamber of Commerce) ▸ there are no (developed) trails to the alpine which is an important missing link in available tourism products ▸ need for effective signing at the Cranberry Junction (verses one small Nass Forest Road sign) ▸ concerns still exist regarding visual corridor management and large logging openings ▸ concern that the hotsprings located at 16 km do not get "developed" as they are a sacred site for the Nisga'a people ▸ concern regarding the protection of geological resources (i.e.: Virgin's Cave) ▸ concern regarding the taking of lava rock for souvenirs, etc.	▸ Very limited financial resources for implementation — are always looking for grants ▸ General lack of information and other resources to assist in tourism planning ▸ Websites are key to better coordination and/or networking between operators both within and without valley (not just Nisga'a) ▸ Government MUST play a role in coordination ▸ Plans for RV park, cultural centre, etc. are contingent on proving that one can get visitors off the beaten path ▸ Communities must support tourism initiatives and get geared-up for any potential project ▸ Need for better cooperation between villages (each has its own EDO & objectives) ▸ A "big picture plan" for the Nass Valley is presently in the conceptual stage ▸ Everyone knows what's up with the Nisga'a (due to treaty process) and therefore 1/2 of the communication are already done

Table 12: Tourism Development Workshop — Stewart, BC & Hyder, Alaska

A focus group was undertaken with members of the Stewart/Hyder Merchants Association[10]. During this working session, delegates were first asked to define their views regarding the strengths, weaknesses and opportunities facing the local tourism sector. After all ideas and comments were recorded, each delegate was then asked to "rank" the importance and/or priority of each idea generated. This process resulted inprioritized issues, comments and ideas, thereby generating result listings which should be addressed —

[10] Workshop took place in April, 1998 as part of the: Stewart/Hyder Tourism Inventory, Marketing Strategy & Development Directions, Greg Meredith, Meredith & Associates, October, 1998.

starting with the highest priority item and working down the list.

Strengths	Natural/Outdoor Tourism Products & Features	
▸ natural scenery ▸ wildlife viewing opportunities ▸ upgrading of Granduc road ▸ presence of Meziadin InfoCentre ▸ easy access / viewing of glaciers ▸ local efforts to "get something done" ▸ beauty of the Portland Canal	▪ Salmon Glacier ▪ Bear Glacier ▪ Bear Pass (scenic touring) ▪ Fish Creek & Blue Lagoon (bears) ▪ International Days ▪ Annual Rodeo ▪ Snowmobile terrain ▪ sheltered waters ▪ Granduc Road Tour ▪ Exploring old mine sites	▪ historic buildings ▪ 90 mile Fiord ▪ Bald Eagle viewing ▪ Tide Lake phenomenon ▪ fishing (fresh & salt) ▪ develop forest trails ▪ easy alpine access ▪ spawning salmon ▪ Black & Grizzly Bear viewing
Weaknesses, Threats & Issues	**Potential Tourism Products**	
▸ poor condition of Highway #37 (north) ▸ lack of community pride ▸ concern with Meziadin InfoCentre location and operational funding ▸ lack of advertising within region ▸ lack of visitor data/research ▸ lack of direction as to where to go ▸ negative attitudes / lack of vision	▪ heli-skiing/hiking ▪ cat-tours/skiing/hiking ▪ wilderness camping ▪ kayaking/canoeing	▪ ski touring ▪ boating/day cruising ▪ interpretation programs
Opportunities & Possible projects		
▸ relocation of Meziadin InfoCentre ▸ development of activities, programs, events in either Stewart &/or Hyder ▸ downtown beautification ▸ consistent visitor data collection & analysis ▸ annual &/or seasonal visitor surveys ▸ creative and proactive advertising efforts ▸ pocket cruise potential		

Table 13: Tourism Development Workshop — Stewart, BC & Hyder, Alaska

The Northern BC Tourism Association undertook a *Community Destination Marketing Seminar & Let's*

Talk Tourism public workshop[11]. This is the community input received at this meeting.

Types of Tourism Appropriate to Area	Needs/Weaknesses Which Need to be Addressed
▪ cultural heritage; ▪ soft adventure; ▪ destination tourism desired (verses pass-through); ▪ wildlife viewing; and ▪ off/shoulder season & winter tourism.	▪ Lack of coordination; ▪ lack of cooperation (need to work together); ▪ sometimes poor attitudes of local residents; ▪ business hours of operation (limited); ▪ require better brochure distribution; ▪ need for more/additional tourism products; ▪ concerns regarding delivery of products; ▪ need to package more tourism products; ▪ need to ensure long term sustainability of Meziadin InfoCentre; ▪ bear viewing (Fish Creek) needs to be better controlled/managed; ▪ need to look into niche marketing opportunities; and ▪ poor record on implementation for tourism strategies/initiatives.
Strongest Product Themes for Development ▪ International (Stewart/Hyder/Ketchikan) - southern Alaskan gateway; ▪ Historical (gold rush, mining, museum); ▪ Wildlife / Natural (Salmon/Bear glaciers, Fish Creek, bears, other wildlife viewing); ▪ Festivals & Events (International Days, Rodeo, Poker Run, Visitor Appreciation Day); and ▪ Outdoor / Recreation (heli-skiing, hiking, cat tours, kayaking, rafting, winter SCUBA diving, ski touring, Granduc Road upgrade, forestry trails.	**Infrastructure Lacking** ▪ downtown revitalization program needs to be implemented; and ▪ perhaps not enough accommodation in town.

Table 14: Tourism Development Workshop — Gitxsan Hereditary Chiefs

On February 3rd, 2000, Greg Meredith of Meredith & Associates met with twelve representatives of the Gitxsan Hereditary Chiefs to discuss both the Fort St. James and Kalum Forest District — Forest Tourism Opportunity Studies. The comments provided by the Gitxsan representatives are summarized below:

Desired Types of Tourism Development	Concerns Regarding Tourism Development

[11] January 17th, 1998.

Cultural villages (& associated spin-offs); Eco-based & Cultural-based education; Interpretation of cultural products; Destination lodge development (if assured of cultural and environmental integrity); River rafting & canoeing; Fishing; Mountain climbing; and Adventure/ecotourism.	How (?) do FN "partner" with non-native initiatives? Far too much red tape with government departments hinder potential development; Forest harvesting activities threaten potential for tourism development; "Access" to land resources is a concern; Land title uncertainty — between government and FN as well as between FN groups (inter-nation boundary overlaps); Need for effective education and training of local residents; Uncertainty of local resident support for tourism development by the nations/bands; Overcoming existing prejudice, Non-native lack of understanding & recognition of Hereditary structure and system; Ongoing clashing between existing structures; Limited access to capital resources required to develop or enhance tourism products; and Over harvesting of potential tourism development lands and resources.
Unfavourable Types of Tourism Development	
Outside people coming in and developing products and 'doing it' without FN consultations; Poorly planned projects; Those causing negative environmental impacts; Those causing negative cultural impacts; and Projects which do not recognize / hire / train local FN workforce.	

6 RECREATION & TOURISM KNOWLEDGE BASE

Tourism and outdoor recreation use are often mentioned together and at times are used interchangeably. While there is a definite overlap between the two terms, there is a difference. Whereas a tourist is usually defined as someone (or a party) travels more that three hours from their place of residence and therefore, usually spends an overnight away from home. Tourism use, therefore, includes (and overlaps with) overnight outdoor recreation use by both BC residents and non-residents visiting the province. This overlap is shown in Exhibit 3 below:

Exhibit 4: Components of Outdoor Recreation and Tourism Use

	TOURISM USE	
Outdoor Recreation Day Use	Outdoor Recreation Overnight Use	Non-Outdoor Recreation Overnight Use
OUTDOOR RECREATION USE		

Many outdoor recreation trips are just for the day. These day users are considered "excursionists" rather than "tourists". BC Parks notes that about 87% of provincial park visits are day use. A survey by the BC Ministry of Forests and BC Ministry of Environment, Lands and Parks (1994) found that about 34% of the wilderness trips taken by BC residents were just for the day.

6.1 Outdoor Recreation in Forest Lands

BC resident use in provincial forests in 1993 was estimated to be about 45 million visitor-days; non-resident outdoor recreation use was estimated at eight million visitor-days[1]. About two-thirds of all BC resident outdoor recreation in provincial forests occurs in areas accessible by road. About 35 million visitor-days of outdoor recreation use in roaded areas and about 18 million visitor-days in roadless (backcountry) areas is therefore estimated in provincial forests in 1993.

For the Prince Rupert Forest Region, about 5% of all use came from residents of this region. About 89% stayed in the region, with Prince George Forest Region (5%) as the next largest destination.

About 60% of all recreation use on Crown land is estimated to occur in provincial forests; and about 40% of use occurs in national, provincial and regional parks. Total actual expenditures for outdoor recreation on Crown land is estimated to be nearly $4 billion per year, with BC residents accounting

[1] BC Ministry of Forests. 1991b. Outdoor recreation survey 1989/90: how British Columbians use and value their public forest lands for recreation. Victoria, BC. Cited in: Forest, Range & Recreation Resource Analysis, Ministry of Forests, 1994.

for about 80% of those expenditures. Annual net economic value of outdoor recreation on Crown land is estimated to be nearly $1.5 billion, with BC residents accounting for about 74% of this value.

6.1.1 Outdoor Recreation Trends

Participation in outdoor recreation can change over time due to a variety of factors, including: population change which affects the number of potential participants; and demographic change, such as age, education and income, which affects participation rates.

Participation rates decline for most forms of outdoor recreation with increased age. The median age of the Canadian population is expected to rise from 33 years in 1991 to 41 years by 2011 and similar changes are expected for BC. This suggests that participation rates for outdoor recreation may drop in the future.

Other trends, most notable increases in education and income, are expected to increase participation rages in outdoor recreation. The proportion of BC adult population with some post-secondary education should rise from 46% in 1992 to 57% in 2003 and an increase in total per capita personal income is projected from 1993 to 2003. These trends in education and income suggest a possible increase in participation rates for outdoor recreation.

6.2 Tourism & The Kalum Forest District

The Kalum Forest District, which is a very accessible tourism destination, is in a prime area of BC for tourism development. It has magnificent scenic resources, with abundant natural and pristine wilderness areas. The region has diverse opportunities for mountain and river recreation, camping, wildlife viewing, and a range of other tourism and recreation activities. These resources are supported by a range of attractions, parks, and facilities which can cater to tourism and recreational needs. However, tourism products targeted at the outdoor, adventure, culture and heritage tourism markets do not at present meet market demands. The opportunity to better capture this market through product development, enhanced tourism services and marketing is strong.

Enhanced tourism development offers regions such as the Kalum Forest District --where traditional resource dependant industries are experiencing a decline due to automation, soft markets and/or decreasing resource supply -- yet one more opportunity to further diversify its economy.

Tourism is a resource based industry which is experiencing substantial growth. The 1995/96 BC visitor survey conducted by the Ministry of Small Business Tourism and Culture indicates that travellers are staying longer and spending more money when they travel within BC. Another key finding of the survey is that travellers are visiting more regions within BC. For the Kalum Forest District this means that more visitors are coming to the area. This increased tourism activity within the region translates into economic opportunities for the region. However, in order to fully benefit from this increase in tourism activity, tourism development must occur to provide the visitor with things to do while visiting the region. This in turn will encourage the visitor to stay longer within the region, resulting in an increase in tourism revenue. The benefits of enhanced tourism development in the Kalum Forest District will be realized through increased employment opportunities in the region, and a higher level of entrepreneurial and income-generating opportunities.

Outdoor, adventure travel and ecotourism is, by far, the fastest growing area of tourism, globally. In the last decade this form of tourism has generated a considerable shift in market interests, new types of products, and how countries and regions are positioning their marketing. In a major market study

done for British Columbia, Alberta and Parks Canada[2], it was found that this market has tremendous potential for British Columbia and Alberta. It was also found that a critically strong attracting factor for ecotourists was to enjoy their experiences in relatively "natural settings".

Ecotourism is also a very lucrative component of tourism, since it attracts a higher-end market who are willing to pay a better price than average for quality experiences. The Kalum Forest District, with its attractive natural features, is in a prime position to benefit from this market surge. However, this will require well designed and executed product development.

6.3 Existing Tourism Status

Existing tourism operators in the Kalum Forest District (KFD) consist of licensed guide-outfitters, licensed fishing guides, destination lodges, front country hotels, motels and restaurants, adventure/ecotourism/heritage & culture guiding operators, and the supporting retail and service sectors.

It has been estimated that about 140 tourism operators utilize the KFD land base in undertaking the delivery of tourism products and/or services. While most of these operators are home-based in the KFD, a small number of tourism suppliers are based outside of the forest district but utilize the natural resources of the area as outdoor activity trip destinations.

Tourists are attracted to the area for a number of reasons, including:

- both resident and non-resident FIT (fully independent travel) targeted at touring and sightseeing and wildlife viewing
- industrial tours available in Kitimat
- both guided and non-guided (BC resident) hunting opportunities
- cultural and heritage products (especially in the Nass Valley)
- both fresh and salt water canoeing/kayaking/rafting experiences
- en route to Alaska &/or the Yukon
- back road & 4X4 touring
- winter activities such as ice fishing, snowmobiling, cross country, back country & downhill skiing as well as heli-skiing
- group tours generated outside the region
- ocean recreation (cruising & fishing) opportunities
- fresh water fishing opportunities available throughout the KFD
- hiking and trekking opportunities including heli-hiking
- summer camping & outdoor activities
- unique natural features (i.e.: lava bed & volcano exploration)

The recently completed Kalum Forest Recreation and Tourism Opportunities Study has generated a substantial amount of information regarding tourism use in the study area. In addition, this study provides a preliminary review of the resource based potential for enhanced or expanded tourism

[2] HLA Consultants & The ARA Consulting Group Inc., *Ecotourism — Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment*, January 1995.

products and/or services. To follow is a summary of the results produced in the FTOS study[3].

6.4 Tourism Operator Offerings – Kalum Forest District

Information on tourism operator activity offerings, displayed in Table 15, has been extracted from operator survey responses and secondary sources. Sums are greater than the total number of operators because an operator may have several activities or services that are considered their primary offering (e.g.: fishing lodge = accommodation and fishing). Secondary activities are considered to be those which are incidental to the primary attraction. For instance a fishing lodge may also offer kayaking, swimming and nature viewing as part of their package. However fishing and the associated accommodation is their primary focus, without which they would not be in business.

6.4.1 Primary Activities

These constitute activities that are most familiar to the regional resident recreating public and traditionally have the greatest number of participants. The Kalum Forest District has historically been strongly linked to freshwater fishing opportunities and access to salt water fishing opportunities. These activities have been the primary tourist attraction in the District. Usage is dispersed throughout the District's river corridors and coastal areas. The experience of participating in the activity is the prime attraction.

Examples of Traditional Activities include:

- Fresh water fishing;
- Saltwater fishing;
- Camping;
- Hunting;
- Snowmobiling; and
- Lodge based activities

6.4.2 Secondary Activities

Public awareness and concern for nature and heritage has expanded the market for the viewing of scenery, wildlife and heritage values as well as low impact recreation activities. The ability to participate in non-traditional activities has increased with the advent of new technologies and the general fitness of the recreating public. Adventure, or the perception of adventure or risk, is an increasingly large component of Alternative Activities. More sedate and less active opportunities for the growing seniors demographic category are also found in the Alternative Activities categories. The insights and education gained through a tour guide's interpretation is as important as the actual experience to participants. Alternative Activities generally require large wilderness or naturally appearing areas with remote access. Wildlife and landscape viewing areas are of increasing

[3] Unless otherwise specified, information & data in the *Existing Recreation & Tourism Knowledge Base Section* is derived from the Kalum Forest Recreation and Tourism Opportunities Study, Clover Point Cartographics and Geoscape Environmental Planners, February, 1999 and the Economic Development Opportunities/Barriers: Forest-related Resources in the Kalum LRMP Study Area, Crane Management Consultants, Meredith & Associates and Majestic Forest Management, 1998.

importance. Highlights for Alternative Activities include alpine areas, glaciers, lava features, hot springs and cultural heritage features[4].

Examples of Alternative Activities within the Kalum Forest District include:

- Hiking;
- Kayaking;
- Mountain Biking;
- Nature and wildlife viewing;
- Adventure recreation; and
- Backcountry Skiing.

A total of 174 tourism operations were identified as being based in or using the Kalum Forest District. Of these 43 indicate that the only service or activity they offer is accommodation.

Table 15: Kalum -- Summary of Tourism Operator Primary and Secondary Activities

Activity type	# of operators indicating this is their primary activity offering	# of operators indicating the activity is a secondary activity
Total Accommodation (non-gov't)	100	
Hotel/motel	27	
B&B	28	
Lodge	15	
Overnight Charter	16	
RV Campground	22	
Camping (non-facility)		12
Marina *	2 (public)	3 (private)
Museum	4	
Art Gallery / Sales	5	
Golf course	2 (public)	1 (private)
Ski Facility	1	
Ski Touring	2	3
Snowmobiling		2

[4] The reader is referred to Annex E (Document 2) for further discussion regarding tourism trends and burgeoning target markets.

Air tours/charters	14	18
Car Rental	5	
Taxi, Bus or Van tours	4	10
4x4 tours		3
Freshwater charter (fishing)	20	31
Jetboating		3
Salt water charters (fishing/tours)	37	41
Marine mammal		14
Motor cruising		27
Sailing		4
Scuba diving	6	13
Kayaking	5	11
Canoeing		10
Beach Activities/Swimming		12
Nature / Hiking	8	
Nature		29
Hiking		30
Fossil Hunting		6
Rock Climbing		4
Mountain biking		4
Horse and Trail	3	3
Hunting (MoE Guide-Outfitter)	3	
General Hunting		6
Wildlife viewing (land or water)		47
Bird watching		15
Scenic viewing		29
Heritage viewing		11

*Tourism operations only. Does not include Federal Government Wharves

6.4.3 Complementary Activities

A number of additional activities were identified as either being important for local recreationists or having significant potential in the Kalum Forest District. Generally these activities either occur throughout Kalum (hunting, camping and boating), are complimentary activities which do not by themselves draw tourists or non-local recreationists into the region to participate exclusively in them (heritage and landscape viewing), or are activities which have a small niche market, poor supporting resources or superior potential outside the region (climbing and rafting). The discussion below highlights some of these activities.

Although province-wide participation rates are declining, **hunting** is a significant regional revenue generator. Both local residents and non-BC residents (with a licensed guide-outfitter) participate in this activity. Licensed guide-outfitters are diversifying the products they offer to lengthen their operating season and maximize their investments.

Golfing and **downhill skiing** remain predominately of local or regional significance. The major inhibiting factors to increasing participation include the length of operating season, capital cost required for development and distance from major population centres. The Kalum Forest District is not known as a destination for either of these activities, although participants from nearby communities outside the region do travel to Kalum to participate.

Camping and **boating** are important activities for local recreational users and also attracts non-locals. Generally these activities are connected to other activities such as fishing and hunting and by themselves do not generate significant economic activity for tourism operators. **Canoeing** and non-motorized boating are popular recreational activities for residents. The Swan Lake Protected Area, Bonney and Fred Wright lakes, portions of the Skeena River, Exchamsiks River, Exstew River and Zymoetz River (from McDonnell Lake to Clore River) provide exceptional non-motorized opportunities.

A number of tourism operators offer **scuba diving** tours, based out of Kitimat. Expansion potential within the Kalum Forest District is limited due to superior opportunities nearby. The distance to travel from Kitimat to these popular dive sites is an inhibiting factor. Several sites in the Douglas/Devastation Channel were noted as popular sites by local recreationists.

River rafting has potential within the region but exceptional opportunities elsewhere in British Columbia may preclude this activity from being developed.

Rock climbing is of regional significance for recreational users with potential for increased opportunities due to the availability of exposed granite. Specific use sites include Tyee, Copper Creek and Chist Creek. Potential to develop a tourism opportunity around rock climbing is limited due to the smaller population in the north and superb opportunities found elsewhere in the province.

The region has significant historic and cultural features which could be marketed as a component of an **eco-tour package** or as an attraction within other activities (mountain biking, hiking or road tours). Landscape viewing is a component of most tourism products. Generally scenic quality is more important to visitors who have travelled greater distances than to local participants.

7 ACTIVITY / PRODUCT ANALYSIS

7.1 Activity/Product Selection

As explained in Chapter 2, the Forest Tourism Opportunities Supplemental Study (FTOSS) builds upon the results of the FTOS which was previously completed for the Kalum Forest District[1]. The FTOS identified 10 activities/products for study and mapping. In order to ensure a compatibility between the two studies, the same products are assessed in this report so readers have available a clear and consistent investigation of tourism development potential from the resource analysis through to development recommendations. During the course of this project, the following 10 products and their related opportunities were thoroughly reviewed and vetted by tourism stakeholders through interviews and workshops:

• Freshwater Fishing	• River Kayaking
• Hiking / Backpacking / Trekking	• Saltwater Fishing / Marine Adventures
• Lodge Based Recreation	• Snowmobiling
• Mountain Biking	• Ski Touring / Backcountry Skiing / Heli-Skiing
• Nature Appreciation / Wildlife Viewing	• Two Wheel Drive Touring

The opportunities and recommendations are not meant to be definitive or to exclude other development options. They are based on a review of natural resource capabilities and existing product and market development of the region – that does not imply other opportunities may not be feasible. An entrepreneur may decide to develop a commercial recreation venture because of the availability of other key inputs such as capital or management experience, even though natural features or the existing pattern of tourism development may not appear favourable for that particular product. The influence of such factors on the development process are difficult to assess and sometimes intangible, but they should never be dismissed by communities which wish to expand their tourism potential and diversify their economic bases. Individuals interested in developing business opportunities are advised to undertake the necessary feasibility and business planning before any investment is made.

7.2 Resource Assessment

The following discussions assess the product capability from a number of different perspectives. The methodology is based on the following criteria:

[1] February, 1999

Suitability / Existing Use	• Is the activity suitable for the study area given from an historical or socio-economic perspective? What is the level of existing use and is their over-development or perhaps underutilized capacity?
Capability	• On a High, Medium, Low scale, what is the overall capability of the resource for hosting this activity/product?
Potential	• What issues or development considerations are known, either through past research or feedback obtained from operators and other local stakeholders, about the potential for further development of this activity/product in the study area.
Market and Socioeconomic Assessment	• Market criteria account for existing and future market potential. Government criteria indicate how dependent the activity is on government-controlled land use and tenure policy/management. Community criteria capture such diverse measures as job creation, community interest and overall economic impacts.

An in-depth description of the market and business development characteristics of each activity/product is provided in Appendix A.

7.3 Freshwater Fishing

Strengths	• Access to optimum sites. Variety of sports species. River systems suitable for sports fishing. Lakes.
Weaknesses	• Uncertainty of regulations results in inadequate promotion. Unguided fishing in optimum guided fishing spots. Illegal guiding. Increasing multi-use of rivers and the potential for conflict (boaters, fishermen, kayakers). Cost to access region (flight to Terrace)
Opportunities	• Natures and wildlife interpretation. Heli-fishing. Expansion of remote lodges.
Threats	• Decline in fish stock. Ill-timed sport fish closures.

7.3.1 Suitability/Existing Use

Freshwater fishing is the best known tourism activity in the Kalum District and is of international significance. The streams and rivers attract fishers for a variety of species throughout the year. Chinook, coho, steelhead and rainbow trout are the traditional target species. Pink and sockeye are targeted in the Skeena and are very popular, especially during the summer months. Other target species include Cutthroat Trout, Dolly Varden, Lake Trout, Northern Pike, Kokanee, Brook Trout, Whitefish, and Burbot (Ling). The activity incorporates a variety of methods (flyfishing, casting), occurs from the shoreline of rivers, with the aid of floatation devices, or in boats (drift, jet and troll

fishing). Jet boats are an important means of access for many of the larger rivers.

Most rivers within a one-hour drive of Terrace and Kitimat see high levels of use (Zymoetz / Copper, Kitimat, Kildala, Dala, Gitnadoix, Skeena, Lakelse, Exchamsiks, Kitsumkalum and Exstew). Farther north the Nass, Bear, Kiteen, Ishkheenichh, Tseax, Cranberry Rivers are important. Lakes are also popular fishing destinations, including Lakelse, Meziadin, and several smaller lakes in the north (Damdochax, Teigen, Kwinageese, Bonney, Fred Wright). The Brim, Gilttoyees, Kemano and Kitlope Rivers in the south are highly productive but difficult to access.

7.3.2 Capability

This activity can be undertaken in all major lakes and rivers throughout the Kalum Forest District.

7.3.3 Potential

Existing tourism operators indicated that the prime rivers used have not reached their social carrying capacity. However, expansion of this product within the Kalum Forest District is contingent on stock availability. The expansion of tourism operations is highly regulated through provincial commercial licencing restrictions. Steelhead has traditionally been undertaken as a catch and release activity whereas other sportfishing has been undertaken as "catch and keep". Recent declines in coho stock have resulted in changes to the management of freshwater and saltwater coho fisheries. The coho fishing closures have also affected the opportunities to fish for other salmon species. International perspectives on the fishing opportunities within the Kalum Forest District are affected by area closures and retention limits. Tourists will go elsewhere (Alaska – Florida) where they can be assured of the "catch and keep" experience. The opportunities for Steelhead fishing with a focus on catch and release flyfishing remain high. The greatest potential for expansion is through the development of remote access, lodge based fishing. There is also potential to increase access to more remote locations through the use of helicopters. The opportunity to link freshwater fishing with nature appreciation/ wildlife viewing can be accomplished by increasing interpretation and awareness.

7.3.4 Market and Socio-economic Assessment

This profile covers any guided sport fishing that occurs in streams, rivers, ponds or lakes. Freshwater fishing was the fifth most popular sport in the US with 45.8 million people participating in this activity at least once in 1998. In Canada, the participation rate in 1996 for recreational fishing (both freshwater and saltwater) was 17.7 percent and in BC, 17.5 percent. While overall participation rates appear stable, spending on fishing has increased considerably over the last 10 years, a reflection of the increased affluence of fishing markets, especially among the lodge-based segment.

As with saltwater fishing, DFO catch-and-release restrictions and closures have had a dramatic affect on freshwater sport fishing. The restrictions are a response to concerns over declining fish populations; the long-term health of fish stocks are critical to maintaining a viable sport fishery. Considering that lake and river fishing is already highly utilized in the Kitimat and Terrace areas, and that provincial commercial licences are difficult to obtain, the best opportunities for new activity will likely be in remote areas. The ability to provide visitors with alternative activity options is also

becoming more prevalent as operators try to diversify and protect themselves against further sport fishery restrictions. Several fishing lodges in the Kalum area have broadened their products in the last few years and met with some success in catering to casual anglers (as opposed to sport fishers).

Fresh Water Fishing

Market Criteria		Existing
Product utilization	Frequency in region	H
	Relation to other products	M
Existing market	Level of importance to existing markets	M
Competition	Extent of competition.	H
Trends	Changes in participation and spending levels.	M
Market Potential	Potential capability of the product from resource and market perspectives.	M
Government Policy		
	Importance of Crown tenure to commercial development.	M
	Potential for conflicting commercial tenures.	M
	Importance of land management.	M
Socio-Economic Criteria		
	Potential for conflicts with other users.	L
	Level of community acceptance.	H
	Job impacts.	M
	Overall (job and income) economic impacts.	M
	Diversification potential	M

7.4 Hiking / Backpacking / Trekking

Strengths	• Scenery, high value recreation features. Alpine hikes with outstanding scenery. Heritage trails and routes. Access to alpine areas.
Weaknesses	• Inclement weather. Few existing trails. Maintained access to the high

	elevations. . Cost to access region (flight to Terrace).
Opportunities	• Development of regionally significant ridgeline and coastal hikes. Linkages with other products such as interpretation and hut to hut. Heli-hiking.
Threats	• Lack of public sector funding to develop and maintain trails. Road closures.

Hiking is associated with trails and logging roads. The dense undergrowth of the coastal hemlock forest makes it unsuitable for off-trail or off-road hiking in low elevations. The most suitable areas are associated with high elevations where the open terrain allows for views of the surrounding vistas. Associations with significant features such as lakes and waterfalls enhance the hiking opportunity and allow for a destination. Loops and maze trails further enhance the hiking opportunities.

7.4.1 Suitability/Existing Use

Hiking is an important component of recreation and tourism in the Kalum Forest District. Trails to the alpine zone within the vicinity of Terrace and Kitimat are highly utilized. Tourism use is focused on day hiking near communities or tourism facilities. Ministry of Forests and forest companies play a key role in providing access to trailheads and developing regional trails for recreational users. Interpretative trails, such as those at Redsand Lake Demonstration Forest, provide a valuable tourism resource. The trailheads are generally accessible via two-wheel drive vehicle. Non-local recreationists participate in extended (multi-day) mountaineering in several locations throughout the region. Seven Sisters Ventures has been granted a commercial tenure for an alpine hut-to-hut hiking endeavour east of Terrace. Heritage trails, including the Telegraph Trail (Damdochax Valley), Nass River Grease Trail and mining trails near Stewart, receive limited use.

7.4.2 Capability

Moderate to High capability for hiking is found along slopes of moderate steepness and on rounded ridgetops. Glaciers and lake edges also provide higher capability terrain. Heritage trails near heritage and mining features show a high capability.

7.4.3 Potential

The key advantages the Kalum Forest District has are accessible alpine ridges and remote wilderness. Other regional assets (heritage, pine mushrooms) can be used as focal points in promoting the activity. Areas identified as having high suitability for increased usage include the lower Nass Valley/Nisga'a lava beds, Bornite Range, Maroon to Kitselas Mountain, Sleeping Beauty, Mount Thornhill, Telkwa Pass, upper Williams Creek, Weedeene, Mount Charlie and Mount Clague alpine, Mount Elizabeth and Robinson Ridge. The Grease and Telegraph heritage trails are underutilized resources which could be developed to enhance further opportunities. There is potential to develop helicopter access to alpine ridges for older or less fit clientele. Some potential exists to promote and develop the activity in the larger river valleys adjacent to Douglas Channel and Gardner Canal (tideline to timber line hikes). The construction of additional trails to attractive

destinations would increase the potential to develop hiking and backpacking for both recreational and tourism users. Shames Mountain has the opportunity to develop a summer product by opening the lifts and developing ridge trails.

7.4.4 Market and Socio-economic Assessment

The hiking market in Canada has a very broadly based demographic profile with an even distribution across age groups and by gender. BC and Canadian residents make up three quarters of the market, while equal shares of the remaining quarter accounted for by US and overseas visitors. Hiking is one product that has a very good participation rate, and therefore high demand, among Europeans. In North America, hiking has been one of the fastest growing outdoor pursuits over the last 20 years because of its relative safety and suitability over a full range of landscapes.

There is a significant amount of unguided activity occurring and it will be difficult to develop a commercial venture around hiking unless there is some value-added developed. In Canada, hiking operators very often offer other activities in conjunction with the hike: more than half offer nature observation as a secondary activity, 34% wildlife viewing and 32% cross-country skiing. All these linkages are possible in the Kalum. Nature observation in particular holds good potential, especially if combined with helicopter access to backcountry alpine where natural features and viewscapes abound. Hut-to-hut development would benefit produce development as it would allow for multi-day tours, and linkages with higher quality amenities (e.g. accommodation). International travellers, especially, expect, and will pay for, a wilderness lodge type of experience on backpacking trips.

The market for mountaineering is more specialized and limited. Hikers exhibit a diverse demographic profile and therefore represent a broader market base, whereas rock/ice climbers tend to be young males, many of whom travel solo. However, the recent popularity of indoor climbing suggests a growing market for soft adventures in which risk is minimized without sacrificing the associated challenge.

Government tenure is not a concern for hiking since most activity takes place on existing trail systems. The bulk of guided mountaineering in the Kalum is conducted by an outfitter based in Smithers; this operator has submitted a tenure application to BCAL for an operating area in the Kalum. Other land use issues concern access to trailheads, mostly via logging roads over Crown land, and the visual impacts of timber harvesting, which tends to have a negative impact on trail and trip quality.

Hiking / Backpacking / Trekking

Market Criteria		Existing
Product utilization	Frequency in region	M
	Relation to other products	H
Existing market	Level of importance to existing markets	M
Competition	Extent of competition.	H
Trends	Changes in participation and spending levels.	H

Market Potential	Potential capability of the product from resource and market perspectives.	H
Government Policy		
	Importance of Crown tenure to commercial development.	M
	Potential for conflicting commercial tenures.	H
	Importance of land management.	H
Socio-Economic Criteria		
	Potential for conflicts with other users.	M
	Level of community acceptance.	H
	Job impacts.	L
	Overall (job and income) economic impacts.	M
	Diversification potential	M

7.5 Lodge Based Recreation

Strengths	• Sport fish. High value features with the potential for wildlife viewing. Proximity to population/ transportation centres.
Weaknesses	• Fish regulations and associated uncertainties. Provincial and regional competition for similar products. Increasing numbers of unguided fishers in target locations. Tendency to attract male-only clients (fishing lodges)
Opportunities	• For fish lodges: expansion into the ecotourism and spa sector, and family packages with diversified activity options.
Threats	• Fish stock, forest harvesting (with visual and environmental concerns). long-duration stays by non-residents, increased use affecting "remote" experience. Land use uncertainties

7.5.1 Suitability/Existing Use

The existing lodges are associated with the freshwater fishing activity, close to rivers. The Skeena and Nass rivers are dominant.

7.5.2 Capability

High capacity for resort development exists where a cluster of activities can be found within 1 hour transportation (boat / floatplane / helicopter).

7.5.3 Potential

The remote wilderness in northern portion of study area has potential. Development can be tied into frontier theme (Stewart/Hyder), mining and First Nations heritage. Douglas Channel/ Devastation Channel has some potential around the hotsprings. Expansion of lodges focused on the fishing industry is not expected in the near future due to the uncertainty of the fish resource.

7.5.4 Market and Socio-economic Assessment

For this discussion, the lodge product refers to a destination-type facility with programming and amenities specifically targeted to the outdoor adventure market. These facilities are most likely to be backcountry operations rather than the frontcountry fishing lodges that are common in the Kalum study area.

Demographic change of key markets indicate a growing demand for this product, in North America and internationally, especially among baby boomers. Lodges are generally preferred by the experienced ecotourist, with 66 percent stating cabins as their preferred choice of accommodation, followed by lodges/inns at 60 percent and tent/camping at 58 percent. In contrast, the average traveller prefers to stay in hotels/motels (56 percent), although as lodges become more upscale and comfortable, they will gain increasing popularity with the general consumer as well.

The lodge business is capital intensive, meaning market entry will be limited. While this will constrain competition, it also means development can be a slow process. Projects such as the proposed Seven Sisters lodge/resort at Cedarvale often cost in the several millions of dollars and take years to develop. The advantage of lodge developments is that their impacts on economic development are very favourable for several reasons. First, resorts are primarily land-based, generating job and income opportunities for nearby communities through site development, investment and ongoing operations. Second, they increase the capacity for more visitation by adding to the facilities inventory. Third, they target market and draw in new visitors thus diversifying the local tourism market profile. Fourth, they can extend partnership opportunities to existing operators for guiding services, thereby enhancing the viability of other small businesses in the region.

Tenure is a very important issue for backcountry lodge development as these will invariably occur on Crown land. The lodge/resort product will not attract the necessary investment dollars if operators are uncertain about land and resource use and management. It is for this reason that BCAL has taken a proactive stance in some areas of the province and issued RFPs for lands believed to have very high capability for development.

Lodge Based Recreation

Market Criteria		Existing
Product utilization	Frequency in region	H
	Relation to other products	L

Existing market	Level of importance to existing markets	H
Competition	Extent of competition.	H
Trends	Changes in participation and spending levels.	M
Market Potential	Potential capability of the product from resource and market perspectives.	H
Government Policy		
	Importance of Crown tenure to commercial development.	H
	Potential for conflicting commercial tenures.	M
	Importance of land management.	M
Socio-Economic Criteria		
	Potential for conflicts with other users.	H
	Level of community acceptance.	M
	Job impacts.	H
	Overall (job and income) economic impacts.	H
	Diversification potential	H

7.6 Mountain Biking

Strengths	• Scenery, significant recreation features, logging roads. Suitable non-technical trails close to communities. Multi-level opportunities. Attraction for northern mountain bikers as an area with "free riding" capabilities. Biking opportunities unique to the region.
Weaknesses	• Lack of trails in general, lack of loop circuits, private lands. Cost to access region (flight to Terrace).
Opportunities	• Development of loop trails linking significant recreation features (i.e. lakes). Hut to hut.
Threats	• Lack of public sector funding to develop and maintain trails. Denied use of private lands.

Mountain Biking is associated with trails, to some extent logging roads and where applicable, helicopters. The dense undergrowth of the dominant low elevation coastal hemlock forest limits

off-trail/road travel. The lower elevation is typically known for *technical singletrack* biking. Technical and high aerobic rides known as "free riding" are associated with gnarly trails on steep terrain riddled with logs, roots, rocks, and other obstacles. The slopes of North Vancouver in the south coast are well noted for this type of ride. Easier rides are associated with rolling terrain on well-developed trails and open terrain. High elevations are suitable for heli-mountain biking, particularly where helicopter access time is short and there are available trails. Consideration for sensitive ecology is a requisite. Loops and maze trails enhance the mountain biking opportunities. Natural history interpretation is a linked product.

7.6.1 Suitability/Existing Use

Mountain biking is predominantly focused on recreational use. Local clubs also sponsor racing events attracting regional participation. The areas between Lakelse Lake and Kitsumkalum Lake absorb the majority of use. Outside of the Terrace-Kitimat corridor the main usage is found in the Telkwa Pass area, via the Zymoetz road network.

7.6.2 Capability

Mountain biking capability can be found on logging roads throughout District. The greatest capability can be found on roads in proximity to Terrace. With the exception of the Stewart/Granduc area, there is limited capability in the north.

7.6.3 Potential

Mountain biking potential is linked predominantly towards recreational day use rather than multi-day tourism use. The product needs to be close to a population centre to be viable. Expansion and marketing of dedicated bike trails may boost the potential for recreational use of this product.

There are a number of opportunities that can be focused on:

- The coastal hemlock forests dominant in the District provide challenges similar to the popular "free riding" of the south coast. As yet these opportunities have not been developed. Opportunities do exist at the power lines (between the airport and lake), Spring Creek Watersheds (small plateau north of town. Race every year).Terrace Mt. Hiking trail (aggressive bikers) and Hirsch Creek trails (logging roads).
- For non-technical appeal, the rolling terrain close to Lakelse Lake (Onion Lake and Clearwater trails), Redsand Lake Demonstration Forest (race every year), Pine Lake and locations close to Kitsamkalum Lake provide opportunities for less strenuous and technical riding (for families and , baby boomers) and this opportunity may promoted along with interpretation..
- Shames Mountain has the opportunity to develop a summer product by opening the lifts and runs to mountain bikes.
- The powerline between Kitimat and Kemano as well as locally have potential to be developed as a loop. Permission from Alcan and upgrading over the pass would be required for this route to be feasible.
- Possible multi-day tours include linking an overnight trip to Smithers via the Telkwa Pass

(overnight in alpine hut) and by van back to Terrace. This region has a network of roads and a variety of natural and cultural features.

- A scenic challenge may be associated with the valley north and south of the Granduc Mine, through the open expanse of level newly glaciated till.
- A unique challenge may be the utilization of part of the Nisga'a Lava flow for a circuit.

7.6.4 Market and Socio-economic Assessment

The age demographic is young (approximately two-thirds less than 40 years of age) with about equal portions of males and females. Participants usually travel either with friends or as couples - families with children have a very small share of this market. More than 83% of all visitors are Canadian. There is only a very small international market at this time. Market size is small, as this is not a prime activity among the adventure market. Nevertheless, markets will continue to grow for biking, especially the bike touring segment.

There is little commercial biking activity in the region, and although there is some opportunity in the extreme and soft markets, potential will be limited by the lack of unique features and the high cost of airfares to the region. The main attributes (e.g. logging roads and power lines) are repeatable in most other areas of the province. Competition is moderate, coming primarily from unguided activity and operators offering biking as a secondary activity. It is reasonably easy to respond to rising demand because the business is not capital intensive and services can easily be an add-on feature for existing operators. Government tenure is not a major issue for biking, but resource use conflicts can be a problem, especially if off-road mountain bikers compete with other trail users and motorized vehicles. As there are no high utilization areas in the Kalum, this has not been a problem yet.

Event promotion is one way to build some exposure in the mountain biking market.

Mountain Biking

Market Criteria		Existing
Product utilization	Frequency in region	L
	Relation to other products	M
Existing market	Level of importance to existing markets	L
Competition	Extent of competition.	M
Trends	Changes in participation and spending levels.	M
Market Potential	Potential capability of the product from resource and market perspectives.	M
Government Policy		
	Importance of Crown tenure to commercial development.	M

	Potential for conflicting commercial tenures.	M
	Importance of land management.	L
Socio-Economic Criteria		
	Potential for conflicts with other users.	M
	Level of community acceptance.	M
	Job impacts.	M
	Overall (job and income) economic impacts.	L
	Diversification potential	L

7.7 Nature Appreciation / Wildlife Viewing

Strengths	• Quality and quantity of cultural, natural and wildlife (land and marine) resources, including unique wildlife (Kermode bear) and natural features (Nisga'a Lave flow).
Weaknesses	• Level of confidence for sighting is low for the high profile animal species. Level of support facilities and services available outside primary communities. Cost to access region (flight to Terrace). Limited wildlife viewing areas,
Opportunities	• Infrastructure development (e.g. trails and viewing platforms) Interpretive and educational tours for wildlife, nature and culture. Mushroom gathering.
Threats	• Land use uncertainties. Poor visual practices in forest harvesting

Nature Appreciation / Wildlife Viewing (NA/WV) are principal activities in ecotourism (low impact, non-consumptive tourism) which continues to grow with environmental awareness.

7.7.1 Suitability/Existing Use

Nature appreciation and wildlife viewing is generally considered a by product to other commercial activities. The Kalum Forest District is regionally significant for viewing of mountain goat, grizzly bear, black bear, moose, beaver, deer, and birds (waterfowl, song birds and birds of prey). Natural features, including the lava beds and glaciers, provide a focal point for general viewing. The rivers are well known for salmon and steelhead and many are sections are utilized for viewing. Marine mammal opportunities are available in Douglas Channel. There are opportunities for he gathering of mushrooms and other forest products. The number of users has been increasing with the advent of eco-tourism type alternative activities. Kitimat also has the oldest living Sitka Spruce in BC.

Although there are no major bird flyways in District, several sites are noted as nationally important

wintering or migration staging sites (Kitsumkalum marshes, Gitnadoix, Ishkseenickh, Bear River estuary, Lakelse, Dala/Kildala River estuary). Trumpeter Swans are found on Lakelse Lake and along rivers. Bird concentrations (including eagles) are associated with oolichan runs (heritage value as well). Bear are noted in the area (especially around salmon bearing streams) with an opportunity for viewing the rare Kermode bear in the Kalum Valley. Marine mammal viewing opportunities are available in Douglas Channel.

7.7.2 Capability

Focal points for wildlife viewing and nature appreciation include rivers, lakes, estuaries, wetlands, old growth, avalanche chutes, alpine zones and major roadways.

7.7.3 Potential

Several locations have high wilderness values where there is high potential for wildlife viewing and nature appreciation. In the north these include Bear Pass, Meziadin Lake, Kinskuch Lake, Damdochax River Valley, Nisga'a Lava beds, Highway 37/37A corridor and the Nass corridor. Central Kalum focal points include the Lower Exstew, Exchamsiks, and Maroon Mountain. Southern potential areas include Gitnadoix, Kowesas and Kitlope Rivers. Glaciers and alpine provide spectacular scenic viewing opportunities.

There is an increasing shift of this product from being a by-product of other commercial activities to being an anchor. There is significant potential to build a tourism product around the scenic beauty found in these areas. Interpretative and educational tours are increasing in prominence throughout the province.

Although wildlife can be found throughout the district, there are no locations in which high profile species such as Kermode and Grizzly bear can be viewed with predictability or where salmon species can be readily viewed in great number as in other location further to the interior. This lack of a focus species makes it difficult to build a viable tourism product around wildlife viewing. There is potential for more general, interpretative tours involving landscape viewing, nature appreciation, First Nations culture and wildlife combined with hiking, road touring or boating. The Stewart area affords potential for combining wildlife, natural feature, scenic landscapes and heritage viewing. Lower Nass (New Aiyansh) offers similar potential.

7.7.4 Market and Socio-economic Assessment

Nature observers and wildlife viewers tend to be baby boomers in the 35-55 years bracket, evenly distributed between women and men. However, nature observers are more likely to travel solo or be on business than other adventure travellers. Wildlife viewers travel extensively as couples or families. Among Canadian tourism operators, the Canadian market represents approximately half of both the nature observation and wildlife viewing participants. The US is a very important market for these activities as well. In fact, nature observation (51%) and whale watching (30%) are among the activities with the highest percentage of American visitors. The German market is also important to the "Other Wildlife Viewing" segment, primarily through their interest in bear viewing.

The Kalum study area does not have a high profile, consistent and predictable wildlife viewing opportunity around which to develop a destination product. As a secondary activity, it does have

potential to offer a complementary experience to other products. Still, the inherent uncertainty in viewing opportunities adds an extra element of risk to development of the wildlife viewing product.

Of more interest to travel markets are the viewing opportunities related to other natural resource in the study area, including glaciers, alpine areas and parks/protected areas. Interpretation and education involving the Nisga'a lava beds and the Kitlope rank high on the list of opportunities. Both of these areas have high appeal for travel markets because of their protected status.

The potential to package nature appreciation with other commercial recreation adventures is one of the best ways to develop unique products. Cooperation and participation by First Nations is an important—if not essential—input into product and business development. Establishing productive partnerships and joint-venturing opportunities will favour success, but it will take time to build these relationships.

Nature Appreciation / Wildlife Viewing

Market Criteria		Existing
Product utilization	Frequency in region	L
	Relation to other products	H
Existing market	Level of importance to existing markets	L
Competition	Extent of competition.	H
Trends	Changes in participation and spending levels.	H
Market Potential	Potential capability of the product from resource and market perspectives.	M
Government Policy		
	Importance of Crown tenure to commercial development.	H
	Potential for conflicting commercial tenures.	H
	Importance of land management.	H
Socio-Economic Criteria		
	Potential for conflicts with other users.	H
	Level of community acceptance.	H
	Job impacts.	M
	Overall (job and income) economic impacts.	M

	Diversification potential	H

7.8 River Kayaking

Strengths	• Easy access to many suitable rivers. Wide range of experiences within one-hour of major communities. Presence of whitewater "play" areas.
Weaknesses	• Lack of supportive infrastructure. Uncertain water levels. Potential conflict with fishermen. Rivers suitable for canoeing may be in conflict with other boating opportunities (jet boating).
Opportunities	• Spectator viewing opportunities. Slalom competitions.
Threats	• Regional competition for the same product.

7.8.1 Suitability/Existing Use

There is no organized tourism related river kayaking usage. However, the Kalum forest District has regionally significant recreational use on the numerous smaller, fast flowing creeks and streams surrounding Terrace and Kitimat.

River kayaking takes place on fast flowing rivers preferably where there is a degree of turbulence ("white water"). The level of difficulty associated with river turbulence, speed and technical expertise is defined by the International Whitewater Classification System. These are:

- Class I: Easy
- Class II: Novice
- Class III: Intermediate
- Class IV: Advanced
- Class V: Expert
- Class VI: Extreme

"Play" sections consisting of large boulders that create "standing waves" and holes provide users with an opportunity to "play".

Examples of known rivers and their classes include:

- Class 1-3: Wedeene and Kitimat (suitable for canoes and beginners. More skill required at high water)
- Class 1-4: Kalum River (Easy (1) until the Kalum Canyon (levels 3-4))
- Class 2-4: Clore (Beginner/intermediate at the upper stretch to a 4 at the canyon)
- Class 3-5: Kleanza (deep valley, steep canyons), Zymoetz (3 runs), Williams Creek (well known clean granite canyon with bumpy waters, waterfalls). Legate Creek.
- Class 4 - 5: Kitanyakwa

Canoeing is exceptional in the Swan Lake Protected Area, Bonney and Fred Wright lakes and many of the slower moving rivers.

7.8.2 Capability

There is moderate to high capability on portions of the upper Nass, Bell-Irving, Copper Kitimat, Exchamsiks, Kleanza, Williams, Clore and Kalum Rivers.

7.8.3 Potential

The region offers a wide spectrum of opportunities and has significant potential on a regional or provincial basis. Existing use is light. A range of river classes as well as experiences within these classes can be found within a one-hour drive of Terrace. Easy access, variety, availability of "play" areas and suitable areas for viewing is the key to expansion. There are potential conflicts with fishermen along the rivers. Slower moving rivers are also suitable for canoeing but may conflict with other boating opportunities.

7.8.4 Market and Socio-economic Assessment

In Canada, river kayakers tend to be between 20 and 44 years of age, male (60%), and travel with friends (29%) or couples (28%). They are from Canada (82%), the U.S. (12%) and overseas (6%). Enthusiast kayakers are usually experienced, ready to take multi-day trips and may or may not use the services of a guide. Participant kayakers have a more casual interest and undertakes single day or overnight trips. This group is much more ready to make a decision to go kayaking once they have arrived in the area. Kayakers have a high level of interest in other activities, primarily nature observation, wildlife viewing and fishing. As the Kalum can offer some significant opportunities in these areas, particularly wildlife viewing and fishing, (along with a full range of river classes) operators who combine unique packages should be able to build this market. The economic development potential of kayaking is very favourable but will be limited by the short operating season and water flow conditions. The frequency of commercial activity on rivers is very low so there is considerable capacity for further development. Terrace in particular could develop a number of close in products that appeal to existing highway travellers. This could be done in conjunction with existing resort/lodge facilities, many of which have river access. Challenges include suitable put-in and take-out points, as well as shuttling, supplies and rental services to self-guided users.

River Kayaking

Market Criteria		Existing
Product utilization	Frequency in region	L
	Relation to other products	M
Existing market	Level of importance to existing markets	L

Competition	Extent of competition.	M
Trends	Changes in participation and spending levels.	M
Market Potential	Potential capability of the product from resource and market perspectives.	M
Government Policy		
	Importance of Crown tenure to commercial development.	M
	Potential for conflicting commercial tenures.	L
	Importance of land management.	L
Socio-Economic Criteria		
	Potential for conflicts with other users.	M
	Level of community acceptance.	M
	Job impacts.	L
	Overall (job and income) economic impacts.	L
	Diversification potential	M

7.9 Saltwater Fishing / Marine Adventures

Strengths	• Sport fish. Scenery. High value features including hotsprings with potential wildlife (bears and whales) viewing opportunities. Culture. Community support and infrastructure. Remote areas (Kitlope).
Weaknesses	• High precipitation. Cost to access region (flight to Terrace). No marine glaciers (as in Alaska). Lack of adequate infrastructure for larger cruise vessels. Increasing numbers of recreationists at hotsprings and sheltered sections of Douglas Channel.
Opportunities	• Promotion of hotspring tours. Opportunity to support regional pocket cruises with North Coast Forest District (development of suitable infrastructures and linkages). Capability to participate in growing demand for ecotourism and cultural/historical exposition (viewing and interpretation). Opportunity to access Observatory/Portland Inlet when road to Gincolx is finalized.
Threats	• Salmon stock. Coho and other sport fish closures (timing, location and

	duration). Allowable salmon possession limits. Competition with Alaska on limits. Forest harvesting (with visual and environmental concerns).

7.9.1 Suitability/Existing Use

The traditional tourism activity of saltwater fishing has the largest number of purveyors in the Kalum Forest District. Douglas and Devastation Channel sees much local use, especially on route to sports fishing locales and hotsprings within and outside the District. Although many of the region's more popular or better known fishing areas are outside the Kalum Forest District, Kitimat and consequently Douglas Channel draw international clientele as a staging area and access route. Tourists embarking from a coastal point outside the region (e.g. Prince Rupert) are rarely found inside the district due to the significant opportunities found elsewhere. However outside visitors from interior communities, such as Prince George, Smithers and Houston use Kitimat as a marine staging point and contribute significantly to the regional user profile. Ecotourism operators accessing the Kitlope and Princess Royal Island utilize Kitimat as well. Southern Gardner Canal is rarely used as conditions for fish (nutrients, water temperature, turbidity) are superior elsewhere and the canal does not connect back to the outer coast (no "loop tour" potential). The opportunity to access the opportunities of Observatory/Portland Inlet will be made available with the finalization of road to Gincolx.

Salmon species, including Chinook, coho, pink and sockeye, are the main target for tourists. Recreational users also target halibut, cod, snapper, crabs and prawn. Saltwater fishery participants are focused on the retention of their catch, as opposed to the catch and release standards of freshwater fishing. Few specific use locations were noted for crab and prawn fishing. Users indicated that marine based wildlife viewing is undertaken on an opportunistic basis as sightings cannot be guaranteed.

7.9.2 Capability

The capability models show that sheltered areas with adjoining features (e.g. river mouths or anchorages near hotsprings or cultural features) have the highest capability. Intersections of major channels, where there are a mix of nutrients and current flows, also might have high capability.

7.9.3 Potential

The product is heavily used within the coastal portions of the region; several participants in this study considered the protected marine passages and islands in the Douglas Channel to be crowded. Maintaining the existing levels of use for this product is contingent on salmon stock availability. At present there are no licensing restrictions (aside from possession limits) preventing new operators from developing a salt-water based fishing operation. This has had the effect of increasing the competition on a limited resource. The activity could be enhanced though combining the fishing activity with wildlife or landscape viewing, cultural activities (learning about First Nations culture), and the visitation of hotsprings. An opportunity exists for the development of a regional pocket cruise product in association with Prince Rupert and outlying communities. Limited anchorages, concerns regarding the long-term viability of the salmon stock and unreliable marine wildlife viewing may restrict the opportunities for expansion of a marine tourism product based solely within the

Kalum Forest District.

7.9.4 Market and Socio-economic Assessment

This activity/product is a hybrid category consisting of a large number of activities, some of which are not linked. Three separate activities are assessed below: saltwater fishing, marine cruising and ocean kayaking. There are also close linkages with wildlife viewing and cultural interpretation.

The region is well-known for saltwater fishing opportunities, with Kitimat as the main staging area and access point for fishing charters. The tourist market is primarily North American and male, although there is a significant amount of regional and BC visitation. Saltwater fishers are primarily "meat" seekers with little interest in other outdoor recreation features or activities. The resource is heavily exploited on the North Coast and commercial activity is being heavily impacted by closures and limitations on the sport fish catch. Traditional markets are unlikely to accept a catch and release fishery and will go elsewhere such as Alaska where they are able to keep their catch. There are opportunities to develop the saltwater sport fishery as a secondary activity to other outdoor products, but this will entail new market development.

The marine cruising activity/product consists of sail/camping and sail cruising markets, with the first targeted towards "hard" experience travellers and the later towards those seeking a "soft" tourism experience. Marine cruising attracts two thirds of it's market from guests who are 45 years or older, predominantly female (63.8%). Participants travel in couples (54%) or solo (34.9%). The adventure/ecotourism market is dominated by Canadian travellers (73%), while the U.S. accounts for 20% and overseas 7%. The diverse nature of the North Coast offers a variety of opportunities for education, observation and cultural interpretation, but the Kalum area (i.e. Kitimat) would still be seen as a staging area to coastal areas. Challenges include maintaining dock facilities needed to attract visitors. And managing visual quality related to timber harvesting.

Ocean kayaking is a baby boomer activity with close to two-thirds (64.8%) of guided participants being between 35 and 54 years of age. Most participants travel as couples (38%) or with friends (29%). There is a very high participation rate by Americans compared to other outdoor adventure products. Among Canadian kayak operators, Canada accounts for 57% of guests, while the US accounts for 37% - only 6% were from other countries. In BC, only 10% of participants are from outside the province. BC has good marketability for this product but opportunities in the Kalum are limited to coastal areas. The ability to offer wildlife viewing cultural interpretation, and other recreational features in remote settings strengthens product potential considerably. Popular locations in BC, like the Gulf Islands, are experiencing heavy use and there is increasing interest in lower use areas. The infrastructure of the area remains insufficient and will need to be developed to take more full advantage of the market potential while also managing for undesired impacts. Government tenure is required if foreshore or land development/use is anticipated. There is some opportunities for coastal hut development to increase the potential for more multi-day trips. As with river kayaking, shuttling, supplies and rental services to self-guided users are required.

Salt Water Fishing / Marine Adventures

Market Criteria		Existing
Product utilization	Frequency in region	M

	Relation to other products	L/H
Existing market	Level of importance to existing markets	H/M
Competition	Extent of competition.	H/M
Trends	Changes in participation and spending levels.	H
Market Potential	Potential capability of the product from resource and market perspectives.	H
Government Policy		
	Importance of Crown tenure to commercial development.	M
	Potential for conflicting commercial tenures.	L
	Importance of land management.	M
Socio-Economic Criteria		
	Potential for conflicts with other users.	M
	Level of community acceptance.	H
	Job impacts.	M
	Overall (job and income) economic impacts.	M
	Diversification potential	M

7.10 Snowmobiling

Strengths	• Scenery. Local access to areas with good capability. Club managed huts.
Weaknesses	• Moderating and inclement marine climate. End of the line with no circuit tour opportunities. Cost to access region (flight to Terrace). Superior opportunities in other parts of BC including adjacent regions.
Opportunities	• Development of remote hut to hut. Spring glacier riding in the vicinity of Stewart.
Threats	• Closure of access.

7.10.1 Suitability/Existing Use

Snowmobiling is a traditional activity of local significance to recreational users. Tourism use and visitation from outside the district is virtually nil. Many lower elevation areas are encumbered by coastal type vegetation and a moderating yet inclement climate. Access to higher elevations is a requisite. A number of sites are significant to area clubs, including Sterling (2 cabins managed by the Terrace Snowmobile Club TSC), Big Cedar, Mount Thornhill, Trapline (1 cabin managed by the TSC), Bolton, Robinson Ridge (cabin managed by the Kitimat Snowmobile Club KSC) and Claque Mountain (cabin managed by the KSC). Backcountry snowmobiling takes place around Summit / Long lake and also in sections of the Cambria icefields (late spring).

7.10.2 Capability

Snow conditions (depth, duration and water moisture) dictate the locations where this activity can occur. Generally the activity can be undertaken in areas where the marine influence is minimized. Access via logging road network is critical for snowmobiling capability.

7.10.3 Potential

Long distances from major population centres, large areas of primarily coastal influences, end of the line and competition from interior regions lowers the tourism potential of this activity. New Aiyansh area has good potential, as does Telkwa Pass. Snowmobiling will remain most important to recreational users. There is an opportunity for the promotion of late spring skiing in the glaciers and icefields near Stewart.

7.10.4 Market and Socio-economic Assessment

The snowmobile market is evenly distributed amongst age groups, with a significant portion 35 and over (60.1%). Almost three quarters are male and half travel with friends. While the median age is 41, many younger people are being introduced into the activity through family outings. While the activity has traditionally been male-dominated, there are an increasing number of women, couples, retirees and families participating associated with the general increase in the soft adventure market.

Conflicts with other users especially in and around popular sites. The chances of future disputes occurring in other areas will rise along with increasing use.

Snowmobiling is attracting some regional and out-of-town users to the area, but commercial opportunities are somewhat limited, mainly due to snow quality and marine weather conditions. The challenge for commercial operators, apart from the land use issues, is to convert unguided visitors to higher-paying guided customers. This can only be done by adding value and service to the snowmobiling experience. Again, land use and tenure is an important ingredient to success. Some control over use and access to tenured areas have to be available, otherwise operators will be hard pressed to invest the capital and equipment needed to upgrade their product, and visitors will have little inducement to spend more on the developed product. There is also an undeveloped opportunity in the touring sector (versus hill climbing) which could be encouraged with more tourism infrastructure (e.g. hut development) and tour packaging.

Snowmobiling

Market Criteria		Existing
Product utilization	Frequency in region	M
	Relation to other products	L
Existing market	Level of importance to existing markets	M
Competition	Extent of competition.	H
Trends	Changes in participation and spending levels.	H
Market Potential	Potential capability of the product from resource and market perspectives.	H
Government Policy		
	Importance of Crown tenure to commercial development.	M
	Potential for conflicting commercial tenures.	M
	Importance of land management.	L
Socio-Economic Criteria		
	Potential for conflicts with other users.	M
	Level of community acceptance.	M
	Job impacts.	L
	Overall (job and income) economic impacts.	M
	Diversification potential	M

7.11 Ski Touring / Backcountry Skiing / Heli-Skiing

Strengths	• Scenery. Proximity to urban centres: Shames Mountain provides access to ski touring opportunities with supporting infrastructure. Extensive Nordic trail system close to Terrace/Kitimat (local). Bell II has high ski touring opportunities and has a heli-skiing company with supporting facilities. Ningunsaw Pass has high opportunities.
Weaknesses	• Access to high elevation areas. Moderating and inclement marine climate. End of the line with no circuit tour opportunities. Cost to access region (flight to Terrace).

Opportunities	• Expansion into backcountry wilderness opportunities. Hut to hut. Snowmobile or snow-cat access touring. Product packaging potential with other activities such as lodges/resorts, build appeal to marathon/triathlon competitive/events
Threats	• Climatic conditions, land tenure, competition/conflicts with heli-skiing and snowmobile use areas lack of public sector funding to develop and maintain opportunities,

7.11.1 Suitability/Existing Use

The Shames area (Mt Morris to Mt Remo) has regional significance for backcountry touring and downhill skiing because of the ease of access and the high quality snow conditions. There is some regional interest in the backcountry skiing opportunities found in the alpine areas surrounding Bell II and Ningunsaw Pass. A commercial heli-ski venture for the Bell Irving has been granted tenure by BC Lands. Recreational users have indicated that they may have conflicts with this venture.

Cross country skiers are mainly of local origin. Use is centred on the extensive trail system surrounding Onion /Clearwater Lakes. Cross country skiers may also be found around Mt Thornhill and, to a lesser extent, Sterling Mountain.

7.11.2 Capability

Backcountry and heli-skiing capability is highest throughout glacial dominated regions. Glaciers also offer significant terrain for ski touring. Snow conditions (depth, duration and water moisture) dictate the locations where this activity can occur. Generally areas where the marine influence is minimized have the highest capability.

7.11.3 Potential

There is significant potential to expand the backcountry skiing profile, although the attraction would be to out-of-region recreationists rather than higher spending tourists. Shames Mountain will continue to be a strong regional attraction. The Stewart (Summit / Long lake and Cambria icefields) and the Bell Irving areas have many potential multi-day wilderness opportunities. Permanent glaciers and longer winter season allows for expansion in some areas. Areas which are long distances from major population centres or which are influenced primarily by the coastal environment have lower potential for this activity. Access, rather than climate, is a major limiting factor for this activity. The increase in popularity for helicopter skiing has potential to provide increased economic activity within the region.

7.11.4 Market and Socio-economic Assessment

This skiing category has two very distinct markets: the heli-ski market and the Nordic ski market (ski touring and backcountry skiing). The former is a small, international market dominated by

American and European visitors seeking a unique ski experience with a controlled element of risk. Per diems paid by heli-ski markets are among the highest in the industry. BC has very high marketability in this activity/product because of well-known operators such as Canadian Mountain Holidays (Banff) and Mike Weigle (Blue River). In the Kalum study area, Bell II is gaining recognition as a heli-skiing destination. Because of the high-spending nature of the activity, the economic and community benefits from heli-skiing are very good, provided operators are based in the region/community. There is further development potential in the Kalum, but user conflicts and access to government tenure will be important development considerations. Heli-ski operators in other regions are facing increased conflicts in prime ski areas (especially with snowmobilers). They are also now seeking to expand into summer activities using their winter tenures, which is causing some friction with other operators who are already licensed for these same activities.

In Canada, the Nordic ski market is quite different from the heli-ski market. It is more family-oriented and the vast majority of participants in BC are residents. The most popular reasons given for why people ski include: 1) the whole family can participate together, 2) practical fun way to enjoy the outdoors during the winter, 3) social contact with other skiers on the trail and at ski area lodges, 4) ideal cross training sport for running and biking, and 5) weight loss - burns more calories per hour than any other sport.[1] The market for Nordic skiing is small, having one of the lowest participation rates by North Americans for outdoor activities, but is growing modestly. Nordic skiing does not have a significant amount of economic development potential for communities in Kalum, but for those areas with favourable resource attributes and a good mix of reasonable access with a wilderness experience, efforts to build this product could generate some positive results.

Ski Touring / Backcountry Skiing / Heli-Skiing

Market Criteria		Existing
Product utilization	Frequency in region	L
	Relation to other products	L
Existing market	Level of importance to existing markets	L
Competition	Extent of competition.	L
Trends	Changes in participation and spending levels.	M
Market Potential	Potential capability of the product from resource and market perspectives.	M
Government Policy		
	Importance of Crown tenure to commercial development.	H
	Potential for conflicting commercial tenures.	H

[1] ibid.

	Importance of land management.	H
Socio-Economic Criteria		
	Potential for conflicts with other users.	H
	Level of community acceptance.	M
	Job impacts.	M
	Overall (job and income) economic impacts.	M
	Diversification potential	M

7.12 Two Wheel Drive Touring

Strengths	• Scenery and culture are primary draws. A circuit routes. Alternative route to the north and Alaska. Potential for roads to handle increased tourist traffic.
Weaknesses	• Gateway, directional and informational signage. Few road side attractions and rural communities. Lack of a circuit in some of the high potential tourism areas. Industrial traffic. Private roads (Kemano).
Opportunities	• Packaging bus and van tours with the other amenities in the region. Linking to other activities (air, cultural, scenic and educational tours). Regional loop tours. Destination to Granduc and Kemano. Linkage to ocean excursion opportunities (new road to Gincolx).
Threats	• Quality of the infrastructure. Status and jurisdiction of roads in the Nass. Scenic management of timber harvesting.

7.12.1 Suitability/Existing Use

Two-wheel drive touring is focused on four roads, with the amount of use decreasing the farther one is removed from Highway 16. The main route consists of Highway 16, which bisects the district through Terrace. Highway 37 (Kitimat to Terrace) and, to a lesser extent, the Kitsumkalum road (Terrace to New Aiyansh and the Nisga'a Memorial Lava Bed Park) are also highly used. Highway 37 north through the district and the Stewart connector receive high levels of use by Alaska bound travellers during the summer months. Paving of the road to Greenville on the Nass and the development of a gravel road to Gincolx is to be completed in the next couple of years. Roads throughout the district are enjoyed by both independent travellers and tourism operators.

7.12.2 Capability

In addition to the aforementioned roads, the Stewart to Granduc Mine road is identified as having high capability. The Kitimat to Kemano road is also identified as having high capability, but in reality is rough gravel to the Dala River, very rough and private (no access) up the Kildala Valley and ends in the valley before reaching the pass to Kemano.

7.12.3 Potential

All two wheel drive roads in the Kalum Forest District can handle increased tourist traffic. Packaging bus and van tours with the other amenities in the region is one key to increasing opportunities in this sector. Tours which provide linkages to other activities (heritage viewing or scenic viewing) could increase usage. Loop tours linking features in the Kalum Forest District with those outside the district could enhance the potential of the touring product.

There is potential to develop and market a loop tour between Terrace and the Nass Valley via Kitwanga. The lower portion of the Nass Valley (Cranberry Junction to Greenville) also has some potential for tours which could be realised with additional marketing efforts. Highway 37A linking Meziadin with Stewart and the roads from Stewart to Granduc Mine have scenic values of provincial significance. The route can be marketed as a scenic glacier route. The Kitimat to Kemano powerline access road is a private industrial road (Alcan) that does not currently extend beyond the Kildala Valley. The costs for upgrading the route to two-wheel drive capability would likely preclude development. With permission, however, this route could be developed as an ATV or mountain bike loop tour with minimal upgrading.

7.12.4 Market and Socio-economic Assessment

2x2 activity focuses on driving and sightseeing, on highways and major roads and in cities/towns. While this type of touring is primarily self-guided, guided bus and motorcoach tours are also part of the market. In the US and Canada over half of the total population reportedly participates in sightseeing, and participation rates have been growing. Short-haul and regional markets are primarily travelling in personal vehicles while long-haul visitors are more likely to visit sightseeing attractions and to spend a greater proportion of their money on packaged tours.

The main advantage to further development of this product in the study area is that the important markets and opportunities are close at hand. Most highway visitors to the region could be attracted to spend more time and money locally, or are actively looking for something to do but have been unable to find an experience to meet their expectations. Moreover, the tourism industry is well-positioned to provide more and better services to 2x2 markets, except in the Nass Valley where there is a real need for more basic services and infrastructure.

Government tenure is not an issue, but government-controlled infrastructure is critical to future development. This involves mainly highway signage and road conditions, both of which need significant upgrading so visitors are presented with more touring options. Presently, highway visitors are moving east-west along Highway 16 or north-south on Highway 37. There are no circle tours or routes and no themed routing, both of which could provide more appeal to 2x2 markets.

Two Wheel Drive Touring

Two Wheel Drive Touring Market Criteria		Existing
Product utilization	Frequency in region	M
	Relation to other products	H
Existing market	Level of importance to existing markets	H
Competition	Extent of competition.	H
Trends	Changes in participation and spending levels.	M
Market Potential	Potential capability of the product from resource and market perspectives.	M
Government Policy		
	Importance of Crown tenure to commercial development.	L
	Potential for conflicting commercial tenures.	L
	Importance of land management.	L
Socio-Economic Criteria		
	Potential for conflicts with other users.	L
	Level of community acceptance.	H
	Job impacts.	H
	Overall (job and income) economic impacts.	H
	Diversification potential	H

7.13 Activity/Product Potential

The FTOS based it's analysis of tourism potential on two factors: the significance of an area in a provincial, regional or local context; and whether the area has both destination and complementary features.

7.13.1 Provincial, Regional and Local Significance

Provincial, regional and local significance of a polygon with high recreation values is primarily based on the capability to repeat an experience elsewhere. Certain high value recreation areas may be scarce on a local level but common in an adjoining region. Likewise from the international

perspective, certain tourism products such as sports fish are identified with the north west of North America. Similar products offered in differing areas gain further significance over another area when considering additional factors such as accessibility, travel time, costs and general aesthetics. An area which has local significance is likely to draw activity participants from nearby. Provincially significant areas may be of little interest to local residents but could draw tourists from afar.

7.13.2 Destination and Complimentary Features

Certain features provide a complimentary or secondary role to a feature that is the primary attraction or destination feature. For example, sports fish may be the primary attraction but wildlife and scenery may provide an important complimentary role that increases the attractiveness of a locale. Complimentary features may also provide the foundation of alternative forms of recreation activities. Areas with the highest tourism potential have both a destination feature and a suite of complimentary features. Generally the more complimentary features which can be found in a given area, the greater tourism potential an area has.

7.13.3 Potential Polygon Identification and Rank

High tourism potential and recreational value polygons are identified through a two stage process. First areas of high recreation value in the Kalum Forest District, as defined by the recreational value considerations described above, are identified. These areas are refined through a review of the tourism capability models, the existing use coverage and tourism / recreation features coverage.

Second, each of the high potential tourism and recreation polygons are ranked against each other according to their recreation and tourism values within a Provincial, Regional and Local context. Polygons are not assigned an individual score or rank for each of the categories nor are the final rankings based exclusively on the either recreational or tourism considerations. Although both tourism and recreation are considered, the final rankings are biased towards the polygon's significance to tourism rather than towards recreation. While the polygons are ranked for the purpose of this study, all have relatively high potential for tourism development compared to areas outside the polygons. Although present circumstance plays an important role in determining rank, the potential opportunities increase a polygon's stature.

Table 16 provides a summary of sub-units in the Kalum forest study area and their applicable potential for tourism. Exhibit 5 is a map of the study area showing sub-unit polygons where the FTOSS has identified a high potential for tourism and recreation development (polygons labels are linked to Table 16).

Table 16: Tourism Potential of Sub-Units Within the Kalum Forest District

Poly #	DESCRIPTIVE NAME	DISCUSSION	RANK		
			Prov	Reg	Local
1a	Bell II	High quality backcountry recreation and scenic viewing	3	6	7

Poly #	DESCRIPTIVE NAME	DISCUSSION	RANK		
			Prov	Reg	Local
1b	Granduc	Regionally scarce. Destination features. Provincially significant glacier viewing along Hwy 37A and the road to Granduc mine. Scenic - peaks / valleys, travel corridors, glaciers. Significant backcountry values. Icefields and glaciers. Quality snow. Large back country lake (Bowser Lake). Quality activities: Backcountry skiing, heli skiing, snowmobiling. The Bell area is of high regional significance. Provincially with the exception of remoteness, the experience can be found elsewhere. Road touring, wildlife viewing.			
2a 2b	Damdochax River Valley Bonney Lake to Nass River	Regionally significant wildlife values. Locally scarce. Destination features. Wildlife viewing and hunting. Provincially significant heritage trail. Excellent fishing. Boating and canoeing on lakes and rivers.	9	9	8
3	Nisga'a Memorial Lava Beds and adjoining area	Provincially scarce. Destination features. Compliments other high potential polygons. Provincially significant Nisga'a Memorial Lava Beds provide scenic touring, hiking and interpretation opportunities. Relationship to Nisga'a tribal lands increases meaningfulness (i.e. heritage values). Regionally significant area for snowmobiling (Sterling and Big Cedar). Significant ridge walking opportunities to the east of lava beds.	2	3	6
4	Lower Nass	Regionally scarce. Locally common. Complimentary to surrounding polygons. Accessible. River related activities:	6	10	10

Poly #	DESCRIPTIVE NAME	DISCUSSION	RANK		
			Prov	Reg	Local
		Fishing. Wildlife viewing. Relationship to Nisga'a tribal lands increases meaningfulness (i.e. heritage values). Undeveloped hotspring.			
5	Shames/ Exstew	Regionally and locally scarce. Accessible. Complimentary to international users and destination to regional/local users. Scenic valleys. Some are relatively unaltered. Boating, canoeing, beginning kayaking. Fishing. Touring. Ridges: Shames Mountain offers high regionally significant ski touring opportunities. Ski mountaineering opportunities. Downhill skiing near community.	7	1	3
6	Kitsumkalum to Kitimat	Provincially, regionally and locally scarce. Destination features but also compliments surrounding regions. High degree of accessibility important feature. International and regional significance. Variety of high quality opportunities adjacent to main population centres. Lakes and rivers: Fishing International and Regional significance. Kayaking (rivers with regional significance), boating, canoeing. Wildlife viewing. Potential Kermode bear. Alpine, subalpine. Trail access. Hotsprings. Resort.	1	5	1

Poly #	DESCRIPTIVE NAME	DISCUSSION	RANK		
			Prov	Reg	Local
7a 7b	Lower Skeena Upper Skeena	Regionally and locally scarce. Destination features for international users and complimentary for regional/local users. Provincial and international significant fishing. Rafting opportunities. Heritage.	4	8	5
8	Copper River	Provincially, regionally and locally scarce. Destination but also used as complimentary feature for surrounding areas. Regionally significant valley. Fossil beds. Canyon viewing. High value kayaking opportunities. Rock climbing. Fishing. Road approach to subalpine/alpine and Telkwa Pass.	5	2	2
9	Foch, Hawkesbury, Jesse	Locally scarce. Complimentary features. Regionally significant marine interface area. Compliments international tourism opportunities nearby and provides alternative opportunities. Foch Lagoon offers very high scenic values. Channels offer high marine mammal viewing and fishing opportunities. Heritage values (paintings). Local features (Jesse Falls). Hotsprings. Anchorage.	8	4	4
10a 10b	Kitimat – Kemano Brim River	Regionally and locally scarce. Complimentary features. Regionally significant values at estuaries (fishing, wildlife). Scenic values Kildala River and Kemano Pass.	10	7	9

Poly #	DESCRIPTIVE NAME	DISCUSSION	RANK		
			Prov	Reg	Local
		River recreation. Offroad potential (ATV, mountain bike). Undeveloped hotsprings. Coastal opportunities.			

NB – polygons are ranked against each other with 1 being the highest rank and 10 being the lowest.

Exhibit 5: High Potential Tourism and Recreation Polygons

7.13.4 Activity / Product — Community Match Summary

The following table provides a summary of the product opportunities identified as having the most potential in each of the study area communities. The focus of the analysis has been on opportunities that appear most viable from a business and financial perspective, as well as those which would have the greatest impacts for community economic development. Again, the lack of mention of a particular opportunity in a particular community does not mean that it does not have potential.

Exhibit 1: Activity / Product — Community Match Matrix

8 TOURISM DEVELOPMENT RECOMMENDATIONS & NEXT STEPS

This chapter of the report deals with broader tourism and community development issues that cut across geographic boundaries and therefore suggest action at the regional level. The major topics addressed include:

- Community Development and Planning – community economic development functions that broadly impact tourism development.
- Business Development – services targeted at the private sector which are meant to stimulate new business activity.
- Infrastructure – basic inputs and services, often provided publicly, that are considered essential for community and economic development.
- Human Resources – initiatives dealing with human capital, including training and education.

Exhibit 6: Summary of Recommendations

Community Development and Planning	• Implementation • Joint Tourism Planning • Community Positioning & Marketing • Lobbying • Communications • Commercial Recreation Tenure • User Group Agreements • First Nations Tourism Development
Business Development	• Product Packaging • Networking • Web Development • Research & Information • Investment Attraction
Infrastructure	• Signing • Highway Improvements • Trail Development

Human Resources	• Tourism Training and Education • Entrepreneurial Skill Development

Community Development and Planning	
→	Implementation
Rationale	
The recommendations made in this strategy will only yield results if there is some commitment to implementation and this is unlikely to occur with ad hoc efforts. Community-based tourism development is becoming increasingly complex and sophisticated, at a time when it is becoming harder to source funding assistance for priority initiatives. Communities in the Plan Area have finite resources and support and cannot reasonably be expected to deal with every issue and event in the community. One solution is to identify and prioritize strategic options, as is being done in this Strategy. Another solution is to leverage all available resources by networking, partnering and working cooperatively with other communities, agencies and the private sector so the region can build some momentum for implementation.	
Actions	
• Distribute project resources: • Distribute opportunity information, including activity/product profiles and business planning guide, to local entrepreneurs and other stakeholders. • Promote map products. • Meet with tourism and community economic development stakeholders to prioritize key initiatives outlined in this study. • Develop a one year action plan focusing on initiatives that could be implemented on a regional basis but which assist with development in all areas. • Prepare a short-list of financial assistance programs for assisting with implementation. • Review financial assistance programs • Prepare a short-list of programs appropriate for outdoor recreation development • Flag programs which have near-term deadlines for submissions. • Prepare and circulate a two to three page "Tourism Financing" fact sheet among tourism stakeholders and solicit further ideas for project submissions.	
Responsibility	Economic development commissions Community Futures TTC Chambers of commerce

Potential Partners	MSBTC NDC

Community Development and Planning	
→	Joint Tourism Planning

Rationale

There are a number of organizations actively engaged in community economic development and tourism development in the Kalum area, but only a limited amount of joint planning takes place, even though there are a host of issues and problems that could be effectively dealt with at a regional level. This is particularly true of outdoor adventure tourism and ecotourism, where activity is dispersed over the regional land base, and where there tends to be a lot of shared infrastructure and market issues. It therefore makes sense for economic development commissions in Kitimat, Kitimaat Village, Terrace, the Nass Valley and Stewart to collaborate and identify initiatives of mutual benefit, establish networks and consider joint actions, wherever possible.

Actions

Form a Kalum action committee of chambers and economic development commission representatives for collaborating on ecotourism development issues.

Compare and share tourism strategy information and identify areas for collaboration, especially where issues are regional in nature, such as transportation, infrastructure and highway signage.

Pursue funding sources within Crown corporations and utility company grant and foundation programs (BC Hydro, BC Tel, ICBC).

Establish an annual tourism symposium in partnership with North Coast communities for the purposes of joint planning, opportunity development and networking. Begin with a value and visioning process so ecotourism planning is given a proper community perspective in the region.

Consider compiling value and vision statements and recommendations from previous community planning exercises for land use decisions or other aspects of community development, including growth management. From these, identify common themes and development consideration that relate to how tourism development affects the local community and region.

Neighbourhood, community and regional levels of interest can be addressed to identify common themes and issues.

Assess tourism development impacts in other communities, prepare case studies and distribute them to stimulate local discussions about desired tourism impacts, values and visions.

Develop a community consultation methodology (e.g. interviews, workshops, community forums) to express clear vision statements.

Establish a Tourism Association or Chamber in the Nass Valley around which to coordinate tourism initiatives.

Existing chambers and economic development commissions should lend assistance in creating an organization of operators and stakeholders in the Nass. A workshop could be held in New Aiyansh

and a survey of potential members could be conducted to determine the level of interest before proceeding.	
Responsibility	Economic development commissions TTC Chambers of commerce
Potential Partners	MSBTC NDC

Community Development and Planning	
→	Community Positioning & Marketing
Rationale	

A community development tool that is often overlooked is marketing - how well you sell your community to outsiders. Most communities don't have marketing staffs or consultants, though most have promotional brochures or videos, run ads in area development publications, or have home pages on the Internet. But how well a community is marketed is extremely important. Yet most communities do not devote half the effort to selling themselves as their local factory does to marketing its output.

This is important because even though communities aren't businesses, they do have customers -- and competitors. That means that, just like businesses, they can benefit from marketing. Marketing can aid community development in a number of ways including attracting tourists. Key considerations in any community marketing program include:

- Marketing Is Selling – It's not enough to have a brochure, video or home page that simply describes the community. Information is not enough. Selling is required.
- Find Something to Sell - Never assume you do not have anything about your community you can sell. Sometimes, even perceived liabilities can be turned into assets.
- Set the Community Apart – In marketing, the community must be set apart from the competition. Many community marketing efforts like brochures and videos are too similar. The community does not always have to be overwhelmingly superior to other communities. It can be enough to be 10 percent better in some important area. And sometimes it is possible to highlight things even where they are not really different. Mention could be made about advantages that other places also have but usually fail to disclose. Communities that differentiate themselves in the minds of their customers can be successful.
- Monitor Results and Test – Communities might be generally pleased with their marketing efforts, but do they know which parts are really producing and which they might well do without? Often, 80 percent of the results are coming for 20 percent of the marketing. To prepare successful marketing packages measure the results of current efforts. Then try something new and see if it works better. The fringe benefit of monitoring and testing is that it can save money. The biggest ads and fanciest brochures or videos are not always the most effective.

• Use Data Selectively - Economic and demographic data on the community can be extremely potent if it is mined for items of value.
Actions
• Conduct a market audit and tourism plans. • Identify key partners to provide assistance and resources in building a plan. • Evaluate the community, including an inventory of the area's best tourism assets, an action plan for their development based on specific job and income potential, an inventory of basic weaknesses, and a plan to reduce or eliminate them. • Assess preparedness factors of the community (e.g. appearance, community facilities, education and training systems, access to financing, access to Crown land, infrastructure and utilities/services). • Focus on identifying what is unique about communities in the Kalum. • Establish a common marketing image that could be branded for use in all forms of advertising and promotion. • Develop community marketing positions or themes around ecotourism products and distinctive features. • Schedule annual visitor surveys to generate reliable travel market data for local use. • Current InfoNetwork data is highly biased and there has been no scientifically reliable visitor exit survey in the region for about 10 years. Communities should be generating more visitor information for assisting with planning and development. While there are many assumptions made about current visitor markets, volumes and behaviour, the fact is that very little is known about who comes to the region and for what reason. • Prepare a schedule for a summer survey that covers as many communities as possible to ensure comparative data is available. • Acquire off-the-shelf survey software (e.g. Survey-It). • Prepare survey instrument (see Appendix: C). • Staff could be hired through one of the many summer student hire programs. • Coordinate this project with area high schools.

Responsibility	Economic development commissions TTC Chambers of commerce
Partners	Municipalities Regional District Community Futures Canadian Tourism Commission

Community Development and Planning	
→	Lobbying
Rationale	
Several issues that came up during the community consultation process closely affect tourism development in the Kalum area, yet there is very little individual communities can do to change the situation. These include: • DFO sport fishery regulations and management; and • Air fares and schedules The problem for individual communities is that dealing with senior government agencies or Crown Corporations on these matters can be intimidating and ultimately ineffective. There is no magic solution to these important issues but a coordinated lobbying campaign at the regional level. The Northwest Transportation Corridor Task Force is an example of what cooperative local efforts can lead to if properly conducted. A similar effort is required of the tourism industry in the Plan Area if decision-makers are to take seriously the concerns of local stakeholders.	
Actions	
• Prepare a position statement on the regulation of the sport fishery in the region, outlining the negative press and impacts that result from changes are made without adequate notice to tourism operators. • Consider undertaking economic impact analyses or case studies, and distribute these to government agencies and political representatives, to draw attention to the impacts these issues have on tourism activity and community development. • Develop partnerships with sport groups and organizations who share similar interests to develop shared strategies for communicating with senior governments and major industry. • Initiative a communications campaign with WestJet promoting Terrace Airport for new commercial service.	
Responsibility	Economic development agencies Operators Tourism associations Chambers of commerce
Potential Partners	Human Resources Development Canada. Ministry of Community Development – Enterprise Program, Community and Cooperative Business Development sub-program. NDC
Community Development and Planning	

Communications

Rationale

Communications are an extremely important function for those organizations involved with advancing tourism in the Kalum Plan Area, particularly in light of the fact that the industry is still considered incidental to the region's economic base and given little consideration as a serious economic contender by many residents, elected representatives and decision-makers. Strategically building awareness and understanding of tourism and its benefits throughout the region should be a priority along with specific project developments and initiatives During the community consultation process for this project, workshop participants stated the following:

- The public had a poor awareness of tourism and its benefits/potential for communities.
- Elected officials did not consider tourism a contributor to the region's economic base.
- The region's youth were not aware of tourism job and career potential.
- Businesses and entrepreneurs were not aware of opportunities for tourism development.

These statements hint at an apathetic attitude, or worse an underlying resistance, toward tourism development that will make it difficult to generate the economic benefits the region is capable of. Historically, tourism in the Kalum has been based on the sport fishery and highway touring, neither of which required sophisticated marketing. With the virtual collapse of sport fishing and travellers demanding more in terms of a tourism experience, the industry will now have to work much harder to build a competitive product and attract markets with an ever increasing choice of destination. Communities which have a flexible and well trained workforce, competitive operators, strong industry linkages, good infrastructure and broad community support for tourism will come out ahead. Before these essential building blocks are in place in the Kalum, there will have to be consistent and well planned communications to overcome apathy and pave the way for developing a tourism culture that will be critical for future success.

Actions

Prepare a communications plan outlining procedures for promoting positive tourism-related events in the community, and outside the community. This would include developing a database of key media contacts and refining criteria for deciding upon what makes a newsworthy event.

Ensure political representatives are targeted in the communications program.

Identify opportunities to have major industry collaborate with tourism businesses on tourism projects and promote these projects to communities as a way of overcoming popular misconceptions that development in tourism usually means economic loss for some other industry (i.e. that economic development is somehow a zero sum game).

Prepare an annual report card on the progress of tourism development in the region, identifying and tracking project developments and communicating these to media contacts and stakeholders.

Prepare a newspaper tourism column with collaboration by EDOs and chambers.

Investigate a tourist in your own town program.

These programs are very popular in the US and Canada and involve giving residents an opportunity to sample attractions, tours and restaurants at reduced prices.

One option is to create and sell a passport with money-saving coupons from attractions, lodging and dining establishments. Tourism businesses can be asked to provide incentives such as percentage discounts, 2-for-1 offers or value-added gift items. In return, participating businesses benefit from increased traffic and visibility through the passports. Usage restrictions are usually permitted by season and by day.	
Responsibility	Economic development agencies Operators Tourism associations Chambers of commerce
Potential Partners	Human Resources Development Canada. Ministry of Community Development – Enterprise Program, Community and Co-operative Business Development sub-program.

Community Development and Planning	
→	Commercial Recreation Tenure
Rationale	
Commercial recreation tenure has the potential for significantly shaping the future of tourism in the Plan Area over the long-term because it will confer certain rights of access and use of the land base to licensees. For this reason, communities should be acting now to ensure their concerns and interests are being met. The issuance of CR tenures may not be a process to which the public currently attaches much importance, perhaps understandably if they also consider tourism to be a minor economic player in the region. But there may be considerable risk in assuming that decisions being made now in granting tenures may not have increasingly important implications, both economic and social, down the road. Even though all Crown tenures have terms and conditions attached, once they are issued, they are unlikely to be revoked and they will carry considerable value assuming that the resource use they confer will come under increasing demand. In forestry, Crown tenures such as TFLs and forest licences are the very basis of industry supply. This may be true of commercial outdoor recreation in the years ahead and communities in the Kalum Plan Area should be ensuring that local community economic development considerations and criteria are built into the permitting process. It is not inconceivably that the most valuable tenures in the region may go to operators or businesses outside the region and thereby limit the local impacts that could be generated by the region's tourism resources.	
Actions	
• Monitor use of existing tenures to determine whether there is under-utilization and thus potential for additional commercial activity through re-issuance. • Lobby BCALC to ensure that community needs are factored into the approval process for	

commercial recreation tenure. Rather than adhering to strict economic efficiency criteria when assessing applications for commercial tenure, BCALC should be encouraged to adopt Ministry of Forests Small Business Forest Enterprise Program (SBFEP) assessment guidelines. For Section 21 value-added timber sales, bidders are given higher scores if they will process the timber in the local community. A similar approach for commercial recreation tenure would ensure that prospective operators carefully consider doing more business in communities nearby the operating area.	
Responsibility	Municipalities Regional District Economic development agencies
Potential Partners	BCALC MoF MELP

Community Development and Planning	
→	User Group Agreements
Rationale	
Many people use Crown land for recreation. As that use and the variety of different users increases, conflicts are bound to arise. In the Kalum, there are several areas where resource use conflicts have flared up in the past, threatening relations between commercial operations and public recreation. Overcrowding of prime river fishing spots and disputes between motorized and non-motorized winter recreation users in the alpine around Terrace were two examples brought forth during the community consultation process. Community Recreation (CR) policy and planning by BCAL will gradually be refined and streamlined to provide a basic support for commercial recreation in the Northwest, but it is unlikely to be a panacea for all disputes that arise between commercial operators, and it certainly will not provide solutions for disputes between operators and other resource users. User-group agreements have emerged in other jurisdictions as a valuable and complementary tool to CR planning and should be actively encouraged in the Kalum before disputes become too polarized and entrenched. Locally produced agreements can often prove effective mechanisms for dispute resolution because they are able to account for local values and interests without the perception that decisions are being made outside the community.	
Actions	
Consider producing a recreation use code of ethics to assist commercial recreation operators self-manage conflicting use. A less formal education brochure could also be prepared by chambers of commerce and distributed to local recreationalists and visitors. Identify areas where there may be concerns about Carrying Capacity or Limits of Acceptable	

Change (LAC).	
Responsibility	Municipalities Regional District Economic development commissions
Potential Partners	BCALC MoF MELP

Community Development and Planning	
→	First Nations Tourism Development

Rationale

While the overall tourism industry is growing by approximately 3 percent to 5 percent every year, resource-based tourism or ecotourism may be growing by as much as 15 percent to 25 percent. First Nations tourism, where aboriginal people are directly involved through control or having their culture serve as the primary attraction, is an important component of these high growth rates in resource-based tourism. But without a sense of the unique challenges and opportunities that exist within First Nations' communities, successful tourism development will be elusive, if not impossible. Specifically, the need for community control of tourism development and the necessity for outsiders to create effective relationships with the community are crucial. This mandate has been given legal force with the impending settlement of the Nisga'a treaty, but it is equally important for all First Nations in the Plan Area.

With cooperate community support and control, tourism has the potential to stimulate economic and social development and provide a mechanism for re-establishing aboriginal approaches to land use and resource management. This is already happening in the Kitlope with the Haisla. More activity along these lines will help rebuild capacity within First Nations communities, affirm cultural values and traditions, empower and strengthen community pride, create employment, generate revenue, provide training and educational opportunities and facilitate cultural exchange. In other words, tourism development can lead to overall community development.

There is an opportunity in the Kalum area for achieving First Nations tourism development through the creation of partnerships, networking and relationships that will bring together all available regional assets into a single development path.

Actions

- Conduct an aboriginal tourism development conference in the Nass Valley.
- Ensure linkages are made with major aboriginal tourism organizations, including the Aboriginal Tourism Association of British Columbia, and the Canadian National Aboriginal Tourism Association, and Aboriginal Tourism Team Canada (part of the Canadian Tourism Commission).
- Investigate uses for programs currently offered to meet assist First Nations tourism development,

including the BC government's Visions for the Future, a series of career development conferences for aboriginal youth, and the Royal BC Museum's Aboriginal Cultural Stewardship Program for aboriginal youth interested in working in native culture interpretation. • Promote joint ventures between experienced tour operators and First Nations	
Responsibility	Economic development agencies Community Futures
Potential Partners	Northwest Community College Aboriginal Business Canada NDC MCDVC

Business Development	
→	Product Packaging
Rationale	
Tourists do not always want just the product or experience that an individual operator offers. Increasingly, they are demanding a variety of experiences, as many built-in services as possible, and a choice of trip attributes such as length of stay, accommodation options and degree of risk/challenge. This is placing more pressure on operators to be flexible and adaptive to market demands at a time when many are reluctant or unable to meet the challenge and be competitive. Outdoor tourism operators tend to be small businesses which directly sell to travellers often without marketing intermediaries or in cooperation with other operators. They therefore may be missing an excellent opportunity to broaden their appeal and increase business through the provision of more diversified and customized tourism products. The way to do this, of course, is through packaging. Packaging can be conducted with other complementary operators or even with similar operators. During community consultations many suggestions were made for packaging new and innovative products/experiences (e.g. family-oriented activities, museum/historical/cultural tours, "wellness" products) with the more conventional outdoor products like fishing.	
Actions	
• Seek professional technical assistance for entrepreneurs from the Province, to continue the process of building tourism packages particularly for small groups utilizing local transportation, accommodation, meals, and tour guides. • Identify a short-haul market (e.g. Vancouver or Edmonton) for package promotion on a pilot basis. • Prepare and market product packages for the regional market (e.g. Prince George). • Identify products/activities with the greatest appeal for the regional market.	

- Identify trade shows and fairs in Prince George where packages could be inexpensively marketed.
- Encourage operators to increase exposure through regional tourism conferences.
- Host a tourism workshop on packaging.
- Identify a product package for promotion among interested operators, detailing composition and pricing. Ensure that:
- Demand-generators (e.g. highly appealing experiences and activities) are included, rather than simplified product statements.
- all necessary services are included.
- Compatibility between package components.
- Pricing is competitive, but profit is assured.
- Ensure packages are included in Tourism BC's travel agents' manual of tour packages.
- Ensure packages meet the provinces guidelines for financial assistance (see following table).
- Host multi-day familiarization (FAM) trips with a select group of Vancouver, Alberta and Washington-based tour operators and travel trade representatives.
- Increase distribution of packages through visitor centres.
- Encourage the establishment of additional inbound tour operators, focusing on increasing penetration of highway travellers for adventure product sales.
- Use the FFTOS inventory of operators to assist with assessing packaging opportunities and for helping operators get in touch with one another.
- Research mailing lists for tour operators in North America and long-haul markets who can be targeted for products available in the region.
- Consider marketing in a cooperative marketing group.
- Marketing was identified as a business skill gap by many of the survey respondents, and companies such as Fresh Tracks, an inbound soft adventure tour operator with 55 adventures in BC, Yukon and Alaska, have shown that collective packaging and marketing can be profitable. Fresh Tracks is a marketing organization which obtains the clients and then contracts to 28 outfitters and guides for the on-the-ground trip experience.
- Prepare a product guide for the Kalum area that would list tourism services, an events calendar, accommodation guide, adventure and recreation operators, attractions and transportation services.
- Identify who is currently providing packages within the region.
- Share the product guide with all operators.
- Work with NBCTC to take full advantage of Canadian Tourism Commission marketing and packaging programs. Several of CTC's programs could be utilized locally, but only once a

consortia of interested stakeholders was formed. Programs such as the Regional Tourism Marketing Initiative program1 and the Adventure program2 could be the impetus needed to generate more packaging locally.	
Responsibility	TTC Chambers of commerce
Potential Partners	NBCTA Human Resources Development Canada Canada-BC Service Centre – PEMD-I Program Ministry of Community Development – Enterprise Program, Community and Co-operative Business Development sub-program.

The following criteria are used by Tourism British Columbia when determining if a supplier is ready to work with Tourism BC in offering "export ready" product to international markets:

Suppliers Must:

- Be in business at least one year, with a proven track record for safe and professional operation.
- Demonstrate an adequate budget and marketing plan that includes international tour operators.
- Understand the roles played by receptive tour operators (RTO's), tour operators/travel wholesalers, and retail travel agents. This includes an understanding of rack or retail pricing, agent commissions and wholesale net rates and client relationships at each level.
- Be willing to include receptive tour operators in your marketing and sales plan, and implement a regular sales call program directed toward these operators.
- Be willing to provide contracted wholesale net rates to receptive tour operators. As a general guideline, requirements are: 15% off the retail price for day activities and transportation and 20-30% off retail pricing for accommodations (higher discounts are common for volume production).
- Honour the contracted net rates, no price changes before the expiry of the contracted agreement.
- Provide detailed pricing and program information to tour operators and receptive operators at least one year in advance of selling season, i.e. May 1999 for the summer/fall 2000 season.
- Be prepared to communicate and accept reservations by telephone, fax and/or e-mail. Provide same-day confirmation of booking arrangements.
- Set up billing arrangements with the operator, agency or receptive tour operator. Accept client vouchers as confirmation of payment for reservations.
- Determine business priorities in terms of group or FIT business. If you plan to pursue group

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[1] http://www.canadatourism.com/en/ctc/partner_centre/partnering/can/tablecont.html

[2] http://www.canadatourism.com/en/ctc/partner_centre/partnering/can/tablecont.html

business, consider access by tour buses, parking/turnaround areas, washroom facilities etc. Determine your maximum group size.

- Carry adequate insurance (minimum $3 million liability insurance for adventure product suppliers is recommended). Discuss this with your receptive operator (sometimes they can add suppliers to their existing policies at nominal cost).
- Provide support (free or reduced rates) for international media and travel trade familiarization tours.

In addition to the above, the following should be considered "next steps" for consideration as business and market presence expands:

- Consider attending travel trade shows involving international buyers, either in North America or overseas.
- Expand the sales call program to include overseas contacts as well as Canada-based receptive operators.
- Be prepared to provide tour operators and media with 35mm slide, CD ROM or standard computer format images of the product or operation, for use in brochures, promotions and editorials.
- Consider producing video footage of product or operation for promotional and training purposes.
- Consider development of a website offering information on your product.
- Be prepared to adapt to uniqueness of certain overseas markets. Flexibility may be required with regard to last minute bookings and changes.
- Consider hiring frontline staff that speak the language of the markets you are interested in pursuing.

Business Development	
→	Networking
Rationale	
Some of the comments received from industry contacts made during this project revealed that some operators, and communities, felt "unconnected" and uninformed because there was no business network through which they could make referrals or share information. Building business networks and linkages can generate significant economic development opportunities as well as cost savings for businesses. Other strategies in this report such as packaging imply some form of operator network – the more vigorous the network, the more likely the industry will attain competitiveness and generate positive economic benefits for the community. Better workforce training linkages, the establishment of mutual infrastructure (e.g. trail systems), the development of a local supplier network, and cooperative marketing are some of the achievements possible through network development. The sharing of strategic planning information, from outlining key business objectives to explaining the obstacles in building critical social and economic ties to the community can benefit all communities in the Plan Area, especially First Nations' communities where business capacity is	

currently limited.
Actions
• Work with all communities in the region to prepare a regional tourism database (e.g. Product Guide). • Accommodation facilities, adventure operators, attractions and transportation companies could all be listed in a single, relational database, using the FFTOS results as a baseline. • Devise a method for maintaining the database on an annual basis. • Distribute the Product Guide to all operators as a resource for encouraging more networking and packaging. • Prepare an email list of local operators, community and government contacts which can be targeted for receiving press releases and other communications (i.e. listserve[3]). Best practices in ecotourism business development could also be promoted. • Share information on common issues such as signage, land use, CR tenuring and infrastructure. • Investigate the feasibility of forming a "Product Club" in the Kalum area. • The Product Club program[4] is administered by the Canadian Tourism Commission for the purpose of encouraging tourism consortia to develop market-ready products. A consortium of small and medium-sized businesses that agree to work together in order to develop new tourism products or enhance existing products which will collectively address issues that are impeding the growth of tourism in a given area or industry sector. A typical Product Club is an independent entity, which could include outfitters, tour operators or tourism associations. Research (on markets, on products, on initiatives in other jurisdictions), workshops/seminars for club members, developing a product development plan, developing a sales strategy, communication tools (e.g. newsletters, meetings) are examples of supported ventures. • A meeting could be held with outdoor tourism stakeholders to gauge the level of interest in forming a product club. An example in BC are the 75 Canadian members of the consortium Trail of the Great Bear, made up of operators in the food and beverage, transportation, accommodation and soft adventure industry, which promote touring, eco-tourism and cultural/heritage products within the Trail of the Great Bear region (Rockies area of Alberta and British Columbia). The Product Club will create year-round barrier-free touring packages through an enhanced communication strategy, research to identify market potential, and a model that can be used in other regions. • A proposal call for Product Club submissions will be issued in Autumn 2000.
Responsibility: TTC

[3] Listserves come in two forms, Discussion Lists and Announce Lists. An Announce List is used to quickly distribute important information to all subscribed members.

[4] http://www.canadatourism.com/en/ctc/partner_centre/shortcutindex.cfm?info=productclubs/productindex.html, (613) 946-1000.

	Chambers of commerce
Potential Partners	Canadian Tourism Commission — Product Club Program NBCTC

Business Development	
→	Web Development
Rationale	
Currently, the Internet is not a major factor either for the markets travelling to the region or for the operators who are providing products and services. However, feedback from successful operators suggests that Internet use can be very effective in terms of generating interest, controlling operating costs and expanding marketing reach, especially when dealing with international visitors. Companies such like Fresh Tracks generate more than half of all their sales through their web site. While some tourism operators have developed sophisticated web sites and email systems, many more in the Kalum Plan Area could benefit by having a stronger Internet presence. Communities can work with operators on Internet development by identifying resources and assistance for web site development, encouraging best practices in design and operation, providing digital information about the area and its resources that could complement product-specific marketing and by encouraging local indexing and linking of sites (especially to high volume sites).	
Actions	
• Evaluate web-site effectiveness. • Use the University of Illinois' "Thumbs Up – Evaluating Community Websites" tool for reviewing best practices in web site design.[5] • Solicit examples of guided tours and packages that could be featured as a main tourism page on the regional websites. • Maintain a tourism links page to important tourism websites as a reference for local tourism stakeholders. The Canadian Tourism Commission[6] and the SFU Centre for Tourism Policy and Research[7] have excellent links' pages. • Undertake steps for gathering more information and data-mining from website visitors. • Identify target Internet sites for co-marketing or placement of creative banner ads to link regional websites.	
Responsibility	Chambers of commerce

[5] http://www.ag.uiuc.edu/~lced/commtele/thumbsup.html

[6] http://www.canadatourism.com/index_ct.html

[7] http://www.rem.sfu.ca/tourism/

	TTC Community networks
Potential Partners	NWCC (student assistance for project design and implementation) Community Access Program (CAP)

Business Development	
→	Research and Information

Rationale

The advent of the Internet has made the concept that knowledge is power truer than ever. The Internet has become a medium for idea generation, industry intelligence, professional and career assistance, communications, and strategic real-time marketing of communities and businesses to the outside world. The economic development commissions in the study area are having to wear the hat of information broker to remain effective. More and better access to information and communication tools provides tourism operators with the strategic day-to-day data and knowledge to set priorities and agendas, and to improve their competitiveness. A first step is to provide access to information resources, such as important trends and developments, which was identified as a need by survey respondents. This would cover primarily links to government sites, statistical sources and research facilities which make available information on tourism issues. A second area of action is in community tourism planning. Unlike other resources sectors, tourism is dominated by small business – the development of backcountry recreation will depend in large part on the extent to which communities can help local operators create mutually beneficial relationships with each other and with those businesses that collectively provide the tourism experience.

Actions

- Economic development agencies should ensure that they undertake market research on backcountry products, markets and trends, using the web site as the main venue for communication.
- Subscribe to membership in the Pacific Rim Institute of Tourism (PRIT).
- Promote the availability of the wide range of newsletters, statistical sources and studies/reports from PRIT.
- Broker access to PRIT resources by individual operators in need of assistance.
- Consider establish an ecotourism resource library in the Kalum by duplicating PRIT resources.
- Develop a one-time project proposal, with costing, for creating an instant library locally. Project sponsors could then be solicited for funding. The project should be of interest because it would have a well-defined outcome and generate immediate benefits as a resource centre for tourism stakeholders.
- Promote the existence of MoF recreation maps to visitor markets to increase awareness of the full range of possible outdoor activities.

• Prepare a "Good Practices" manual for distribution to new operators, particularly those from outside the community. The manual would outline the benefits to the community and the operator or good practice fundamentals and encourage operators to hire and buy locally. • Produce and distribute a tourism business planning guide for local entrepreneurs. • Ask banks to assist with outlining financial planning requirements for operators.

Responsibility	Economic development agencies Community Futures
Potential Partners	Human Resources Development Canada. Ministry of Community Development – Enterprise Program, Community and Co-operative Business Development sub-program.

Business Development	
→	Investment Attraction

Rationale
Community economic development practitioners often offer site selection services to encourage businesses and entrepreneurs to relocate in the community. This is one of the many tools used to attract new businesses into the region, and to retain existing businesses that might want to expand or relocate to some other location. The problem with resource-based tourism development is that getting access to the appropriate information and packaging that information in a convenient format has been a difficult, if not impossible, task. Now that MSBTC and BCAL have compiled map-based information about outdoor product capabilities in the Kalum, there is an information tool that EDOs can use to encourage new activity and guide their attraction efforts for tourism development. There are many advantages to identifying and packaging site information. First, the community has a way to get involved in Crown land use and disposition rather than leaving all decisions up to provincial decision-makers. Second, the community can be proactive in identifying where the preferred sites are and planning around them. And third, it gives the community a marketing and business development tool.

Actions
• Encourage the completion of a tourism development site guide. • Local economic development agencies could prepare a site guide for tourism development in conjunction with BCALC. • The idea of actively identifying and promoting sites with favourable development prospects makes sense in terms of land use and investment attraction. For agencies such as BCALC, such a product is valuable because it has a chance to review and pre-approve sites that may be targeted in applications for Crown land tenure and sale. For communities and regional districts, the guide could be featured in their marketing and attraction programs, as well as assist with the forecasting and planning for future infrastructure and services.

- The initial focus could be on remote fishing lodges, or alpine huts/lodges with high quality resources, no use pressures and high probability for tenure.
- Seek the cooperation of BCALC and the MoF on a cooperative, inter-agency approach to the marketing of tourism tenures.
- Prepare a handbook for helping tourism developers negotiate the land use process in establishing their businesses.
- An investor's guide could be refined to target tourism projects. A flow chart format which detailed the process an investor would have to follow in obtaining the requisite land and tenures would be invaluable. While a single flow chart that tries to track the steps for all development possibilities might prove to be a bit too complicated for presentation, there may be an opportunity to prepare a flow chart that outlines the basic steps and to append to this case studies providing more detail for specific projects and products.

Responsibility	Economic development agencies Community Futures
Potential Partners	BCALC MoF NDC MCDVC MSBTC

Infrastructure	
↳	Signage and Gateways

Rationale

The BC government, through the Service and Attraction Signage Program, administers standardized directional signage for tourism-related services and facilities throughout the province. The system is based on a classification of highways and sets out sign policies by type of business for each class of highway. Unfortunately, existing policies have managed to produce a very utilitarian inventory of tourism signage that lacks the marketing savvy and power which operators needs to draw more visitors off the highways and into their facilities and into local communities. While influencing provincial highway sign policy may not be a realistic objective in the short-term, there are other avenues of action a community can take to improve tourism signage, including working with the MoTH for special theme signing and improvements to regional and local government signage policy.

A well-coordinated signage program can generate many benefits for the community by improving access to essential services and facilities, promoting visits to operators and their attractions and by enhancing the overall profile of tourism in the region.

Actions

- Develop a Kalum route connecting Kitimat to the Nass Valley through Terrace.
- Establish a partnership of interested organizations, including Terrace Tourism, chambers of commerce and economic development commissions.
- Develop a route name (e.g. volcano, lava or river related).
- Develop a theme and design concept for presentation to MoTH. The idea would be to prepare new signage for key turnoffs and to direct visitors through a Nass Valley/Terrace/Kitimat corridor. An agreement could be struck whereby communities could contribute funds for concept design, while MoTH would prepare and erect the signs.
- Prepare a regional Signage Design Manual in conjunction with the regional district and municipalities. Consideration should be given to four types of signs: community, advanced warning, trail and facilities.
- Develop a set of consistent themes that will appear on signs, for example to feature different product opportunities such as wildlife viewing, access points to recreational features
- Plans should be made to erect gateway signage for:
- Nass Valley (@Terrace and Cranberry Junction).

Responsibility	Municipalities and regional district Chambers of commerce Economic development agencies
Potential Partners	MoTH NDC

Infrastructure	
↳	Highway Improvements
Rationale	

The road and highway system is as critical an infrastructure component for tourism as it is for the other economic sectors in the Plan Area. But there are numerous situations where the road infrastructure fails to meet acceptable provincial standards, compromising safety and impeding further economic and community development. This exacts a financial cost on individuals and businesses and an economic cost on communities. In the case of tourism, it can have a major impact on project feasibility.

In areas such as the Nass Valley, where the problems are probably more severe than anywhere else, road infrastructure is a fundamental building block for tourism. Without minimum standards of safe operation and speed, it will be difficult to entice highway travellers into the Valley and, importantly, develop circle tours. Improvements to the Cranberry Connector and maintenance of the lava bed access road were also mentioned as issues in the Nass. In Terrace, concern was expressed about

difficulty of access to the Ferry Island campground and the negative impacts this was having on getting highway visitors to overnight in the community.

Government spending patterns for rural infrastructure are often unpredictable so the prospects of highway improvements in the near future are unknown. Nevertheless, there is no reason why a coordinated attempt at identifying road/highway priorities from a tourism perspective should not be undertaken, and used to lobby provincial authorities.

Actions

- Establish a rural highways and roads taskforce to investigate development priorities in the region and determine road budget priorities.
- The purpose of the task force would be to create some continuity of dialogue with the province, Crown corporations and the local MLA and develop some long-term planning goals as well as short-term budget priorities.
- For the Cranberry Connector and other possible circle routes, prepare a marketing/transportation strategy to support longer-term investment.
- Prepare a brief outlining the major economic activities on the road and how provincial government revenues are benefiting from local resource activities. The brief could be supplemented with the following data, if pertinent:
- Document accident rates and insurance claims to determine if there are safety issues involved.
- Estimate economic and community developments that could be held up as the result of poor road quality.
- Obtain testimonials on road conditions.

Responsibility	Municipalities and Regional District Chambers of commerce Economic development agencies
Potential Partners	MoTH NDC

Infrastructure	
→	Trail Development

Rationale

Trails are essential for providing public access for a wide variety of outdoor activities from sightseeing and wildlife viewing to mountain climbing and mountain biking. Walking and hiking in the natural environment is expected to be one of the fastest growing segments of outdoor recreation over the next 20 years. Trails provide visitors with first-hand opportunities to understand, appreciate and enjoy key scenic and natural resources, themes and values. It is for these reasons that

organizations like Parks Canada have placed a priority on creating a high standard of presentation and access to recreational opportunities through trails. Unfortunately, there are very few developed trail networks in the Plan Area, despite there being some excellent potential for linking together high quality features in a natural setting. And the options for trail building and maintenance are fewer now than they were in the recent past years when Forest Renewal BC was extensively involved in funding recreation projects. That funding has almost dried up and both community groups, as well as MoF recreation programs, will suffer as a result. This will place more pressure on regions to come up with local solutions for building and maintaining their trail systems.

Actions

- Assemble research on best practices of trail development. There are numerous resources available both in hard copy form (e.g. Pacific Rim Institute of Tourism) and on the Internet.
- Review Parks Canada's best practices examples for trail development. Although the focus is on in-park development, most of the assessment tools and planning guidelines are applicable to any trail system
- Undertake a community recreation plan dedicated to trail system development, with particular attention to the following issues:
- Identify and develop an integrated multi-use trail system for land-based and winter-based products.
- Propose solutions for separating uses into specific zones. Dedicated mountain biking trails in close proximity to Terrace and Kitimat might be a first step.
- Lobby the MoF for increases in the recreation budget to be targeted at trail maintenance. While this would only address MoF's trail inventory, there would at least be some effort to maintain the trail system.
- Research should be conducted into implementing a user-pay system for furnishing the resources needed for ongoing trail maintenance, as the BC Snowmobile Association does with its members.
- Prepare a pre-feasibility of heritage trail development in the Kalum, focusing on the Telegraph Trail, Nass River Grease Trail and mining trails near Stewart.
- Review status of management planning with MoF and MSBTC on these systems.
- Request assistance from MSBTC and NBCTA for assistance in plan development.
- Investigate the feasibility of tapping into the E-Team Program[8] for trail development in the Kalum.
- The program is part of Youth Options BC delivered by the Ministry of Environment, Lands and Parks and directed at youth aged 16 to 24. Projects must have an environmental or outdoor recreation focus, and 20 per cent of project time must be dedicated to training and developing skills for future employment.

Responsibility	Economic development agencies

[8] http://www.youth.gov.bc.ca/programs/eteams.asp

	Local recreation clubs with trail interests Commercial operators with trail interests		
Potential Partners	FRBC	MoF	MSBTC

Human Resources	
→	Tourism Training and Education
Rationale	

Workforce development is one of the more difficult tasks not just for tourism but for the economy at large. The workforce is changing drastically from an industrialized production era to a high-tech, value-added, knowledge-based production of the information intensive industries of the future. These changes are leaving many workers under-employed and unemployed. Many workers will need to learn totally new skills to survive and become competitive in the new workforce of the future. Those who do not will find work harder and harder to find. Communities involved in tourism development need to be aware of this situation and to focus efforts on providing opportunities for gaining the advanced skills necessary for new workforce demands. In addition to these training demands, there are new challenges such as developing strategies to keep youth in the community and the attraction of workers into the local labour market. Challenges include:

Determining the workforce needs of local tourism businesses in order to be effective and competitive.

Creating local training programs to address these needs.

Recruiting trainees among youth and other workforce participants.

Communicating tourism employment opportunities and careers to the workforce.

By paying attention to local training and education capacity, communities can increase the economic impacts of tourism development because operators will be more likely to source their staffing needs locally. Personnel trained locally and more likely to be aware about local environmental, social and economic issues and be advocates for the region rather than just the business itself.

Actions	

- Promote tourism career opportunities to the workforce.
- The stereotype of the low-paid tourism job is not entirely accurate. There are a range of occupations that require a variety of skills and training, and earnings reflect these differences. Industries with an important tourism component where weekly wages are above the sector average include air transport, museums and archives, auto and truck rental and travel services. Even the entry-level jobs in tourism which are low-paying provide an opportunity for new workforce entrants to gain experience and ascend to better positions at higher pay. The seasonal and part-time positions available in tourism can be a valuable source of employment for those members of the workforce who may not want full-time work, for example because of family obligations.
- Support Kitimat's attempt to attract a UNBC outdoor recreation program to the community.

• Identify ways to increase partnerships between operators and students (e.g. guide mentoring or apprenticing program). A mentorship program can be highly effective method of in-the-field training. • Expand use of NBCTA training opportunities. • Encourage the use of SuperHost tourism training program developed by Tourism BC. • Utilize the training materials and resources of the Pacific Rim Institute of Tourism (PRIT), which maintains a reference library containing a variety of manuals and videos widely accessed by the tourism industry.

Responsibility	Economic development agencies Community Futures
Potential Partners	HRDC Northwest Community College School districts

Human Resources	
→	Entrepreneurial Skill Development

Rationale
Entrepreneurship (the conception of both business and non-business enterprises in all their forms) is one of the keystones of community economic development. Entrepreneurs are the risk takers, innovators and agents of change who will generate new business development and improve the economic and social welfare of the community. Entrepreneurs can sometimes be attracted to a region, but the best prospects for future prosperity reside in those communities which have successfully developed their own culture and spirit of entrepreneurship. Entrepreneurs are not born - they have to be educated, nurtured, and assisted in an environment that will allow them to realize their potential. A community which values and encourages entrepreneurship will have a much more valuable tool for adapting to change and developing a prosperous economy. Entrepreneurship is important for tourism development in the Plan Area. Economic development practitioners are concerned that the school system is not developing young entrepreneurs who could lead economic change in the future, especially in tourism where new ideas and innovations are needed.

Actions
• Assess demand and potential for young entrepreneur programs. • There are resources available for encouraging young entrepreneurs. Junior Achievement and the

• province's You BET program[9] are both targeted at youth entrepreneurship, but neither is delivered • in the Kalum area. A Junior Achievement program would be a longer-term project because it requires more forward planning, but You BET could easily be delivered in the short-term, providing enough interest was shown by area youth. You BET consists of a series of one day workshops aimed at introducing youth to entrepreneurship as a career option. It can be delivered by the Ministry of Small Business, Tourism and Culture free to the community, provided there is a demonstrated need and demand. • Support career preparation programs that support both entrepreneurship and tourism/recreation. • Assess feasibility of Kitimat Skills Centre delivery of short-duration seminars and courses targeted at existing operators. • Currently, the Skills Centre is heavily oriented to industrial programs but could be encouraged to expand into tourism training. • Operators could be surveyed to gauge the level of interest in courses.	
Responsibility	Economic development agencies Community Futures
Potential Partners	HRDC Northwest Community College School districts Kitimat Skills Centre

[9] http://www.youth.gov.bc.ca/programs/youbet.asp